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PD-ABS-004

UNITED STATES OF AMERICA
AGENCY FOR INTERNATIONAL DEVELOPMENT

184005

1 Country of Performance Worldwide Advisory & Assistance
Services Yes / / No /x/
2 Contract Number FAO-I-00-96-90020-00 Delivery Order No 02
(Incorporating FAR and AIDAR Clauses)

NEGOTIATED PURSUANT TO THE FOREIGN ASSISTANCE ACT
OF 1961, AS AMENDED, AND EXECUTIVE ORDER 11223

3 CONTRACTOR (Name and Address) > 4a ISSUING OFFICE
World Learning, Inc > Agency for International Development
1015 Fifteenth Street, N W > Office of Procurement, M/OP/ENI/DHR
Suite 750 > Washington, D C 20523
Washington, DC 20005 > 4b ADMINISTRATION OFFICE
> Agency for International Development
TIN No 030-179-592 > Office of Procurement, M/OP/ENI/DHR
CEC NO 07-396-1419 > Washington, D C 20523
>

5 PROJECT OFFICE > 6 PAYING OFFICE SUBMIT INVOICES TO
J Nindel, ENI/DGSR/HRDSR U S Agency for International Dev
Room 2637, NS Office of Financial Management
Washington, DC 20523 Room 700, SA-2
Washington, DC 20523

7 EFFECTIVE DATE > 8 ESTIMATED COMPLETION DATE
May 1, 1997 > September 30, 1999

9 ACCOUNTING AND APPROPRIATION DATA
See following page

10 The United States of America, represented by the Contracting Officer
signing this Order, and the Contractor agree that (a) this Order is
issued pursuant to the Contract specified in Block 2 above and (b) the
entire Contract between the parties hereto consist of this
Order and the Contract specified in Block 2 above

11a NAME OF CONTRACTOR > 11b UNITED STATES OF AMERICA
>
World Learning, Inc > AGENCY FOR INTERNATIONAL DEVELOPMENT
BY (Signature of authorized individual) > BY (Signature of Contracting Officer)

Robert C Chase > Barbara P Brocker
TYPED OR PRINTED NAME TYPED OR PRINTED NAME

ROBERT CHASE > Barbara P Brocker
TITLE TITLE

Vice President WLI > CONTRACTING OFFICER
> M/OP/ENI/DHR

DATE 5/2/97 > DATE MAY 2 1997

Contract No FAO-I-00-96-90020-00
Delivery Order No 02

NMS Request No 0000136

Delivery Order Ceiling Price \$25,172,365
Amount Obligated 3,138,296

Fiscal Data

<u>Account Nos</u>	<u>Amount Obligated</u>
AI96/97WAI697	\$ 106,569
AI97/98WA797	919,643
AI97/98WA797	163,139
AI97/98WA797	225,170
AI97/98WA797	104,214
AI97/98WA797	595,476
AI97/98WA797	288,625
AI97/98WA797	91,184
AI97/98WA797	396,205
AI97/98WA797	<u>248,071</u>
	\$ 3,138,296

ARTICLE I - TITLE

Global Training for Development - Participant Training Project for Europe (PTPE)

ARTICLE II - BACKGROUND AND OBJECTIVE

The U S Agency for International Development (USAID) has awarded a contract for services related to individual or group participant training (Participant training is defined as trainee enrollment and study in a training activity of any length taking place in the U S , in-country, or in a third country The trainee may not be a resident of a third country or the U S) Services under the contract will include providing an integrated package of participant trainee support services that may incorporate some or all of such in-country activities as training program development, related training needs assessment, trainee selection, documentation, logistical arrangements, and post-training follow-on programs, in addition to U S or third-country placement, training program monitoring and administrative support (e g travel, maintenance allowances, applicable taxes)

The contractor will also provide technical assistance on other training related matters, e g planning of training programs in relation to mission/bureau strategic objectives

Clients under this delivery order are USAID/W ENI Bureau and the following USAID field Missions Albania, Bosnia, Bulgaria, Croatia, Hungary, Lithuania, Latvia, Macedonia, Poland, Romania and Slovakia

Under the terms of this delivery order, the contractor will be technically responsible to the ENI/DGSR/HRDSR with only very general technical oversight by the Global Bureau's Center for Human Capacity Development, Office of Basic Education and Learning Systems (G/HCD/BELS) ENI/DG/HRDG will involve the participating Missions in all decisions regarding the expenditure of their funds under this contract

Although the economic policies of the former Eastern Block countries have been discredited, the Soviet system nevertheless succeeded in developing an educated work force with more M D 's, Ph D 's, and Ed D 's per capita than the U S , particularly in specialized scientific and technical areas However, this work force lacks many of the skills, attitudes, traditions, basic organizations, work habits, and institutions on which democracy and free market economies must ultimately rest

Years of social, political, and economic isolation limited the ability of even the best educated Eastern Bloc citizens to comprehend fundamental characteristics and tenants of Western, free market democracies, e.g., the roles prices and markets play in capitalist systems, the rights and responsibilities of individual citizens or groups within a democracy, or the role of elected local governments in promoting private sector development. While there have been reforms in most sectors, the benefits of the reforms are not apparent to much of the population. Citizens as well as leaders are openly cynical of markets, mistrustful of profit-making firms and doubtful about the ability of public and private sectors to forge partnerships to improve the quality of life or to expand personal and professional freedom for the average citizen and improve their quality of life. Technical training activities will address this problem by providing substantial numbers of CEE leaders and professionals with practical knowledge about and experience with free market economies and democratic governance so that they will possess the technical skills and attitudes required to create similar policies, programs and institutions in support of a transition to free market democracies.

It is obvious that much of the actual training could be conducted in-country at a lower cost but for certain select leaders and professionals there is a need to take them from an environment that was hostile towards Western techniques, approaches and attitudes and to show them first hand that such techniques and values can lead to desirable results.

Third country training may be substituted for U.S.-based training in those instances where it is determined that the reform models in the third country are more appropriate to the stage of development in the particular CEE country.

Training programs and activities must support Mission strategic objectives and be reflected in the individual country Strategic Plan. The impact of any training activity that the Agency undertakes will be measured by how well the acquisition of new knowledge, skills and attitudes contribute to results in one or more of the five development objectives to which the training must be linked.

Based on lessons learned about how best to plan, design and implement training for development, USAID has put into place new policies and procedures that emphasize the results of training. The need to plan and train for impact is underscored by increasing fiscal constraints in the CEE missions, every dollar spent on training must count. Training impact is now to be measured not in numbers of returnees from training successfully placed in jobs, but in results stemming from returnees' individual or collective impact on their work place, professional sector or society. Accordingly, participant training related services will be designed and provided.

- (1) by responding to USAID's mandate that training must contribute to sustainable development goals,
- (2) by arranging the most cost effective means of accomplishing program and/or development goals,
- (3) through direct interaction with, and responsibility to, the requesting USAID mission or bureau sponsoring the training

USAID expects returned trainees to have the technical/scientific skills and motivation to initiate change in collaboration with others who received similar training in the U S or third countries and/or to support change initiated by their colleagues, their agencies, and their government

USAID-sponsored, U S -based training will also focus on developing lasting U S - CEE linkages between individuals and institutions which will facilitate trade, investment, technology transfer and cooperation on global political and economic issues of mutual concern

Components of the training experience must be fully integrated It shall contain modules of planning, pre-departure orientation, in-U S or third- country orientation, academic and/or technical training, cultural experiences, community service, leadership or management training as appropriate, re-entry and follow-on activities In particular, U S training acquaints the participant with aspects of American culture and provides trainees an opportunity to form international professional and social linkages and networks made up of more than immediate academic or technical colleagues

ARTICLE III - STATEMENT OF WORK

See Attachment 1 to this Delivery Order

ARTICLE IV - REPORTS

Reports are required as stated in the Statement of Work (see attachment 1), and as follows

MONITORING AND EVALUATION

(a) External Evaluations of the Delivery Order

External evaluation focusing on key implementation and management issues may be scheduled at any time. External evaluations will be conducted by independent experts and may include a detailed assessment of contractor organization, management, field work, and overall performance. The external evaluation may result in recommending contract changes. A formative evaluation may be conducted during the life of the delivery order, and a summative evaluation will be conducted at the end of the contract. Costs of external evaluations of this contract will be covered by USAID, and will not be charged against this contract.

(b) Performance Evaluations

The following questions are representative of (but not inclusive) those that may be addressed during regularly scheduled monitoring visits:

- (1) Are the rationale and objectives of the delivery order as set out in the statement of work still relevant to addressing CEE country needs?
- (2) Is this delivery order mechanism the most efficient and cost effective way to deliver training services to CEE missions?
- (3) What changes in objective, procedures or definition of client are needed in the delivery order, if any, and why? Are these changes consistent with the contract?
- (4) Are there issues of resource availability, goal or performance agreement, management, etc., that affect the efficiency and impact of the training programs? How can they be solved or corrected?
- (5) Is the contractor delivering on schedule the outputs and results targeted in this DO? If not, what can be done about it?
- (6) Are Missions and the Bureau kept informed regarding the status of training activities? Are serious problems shared with HCD?
- (7) Are USAID policies and procedures being followed?

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Prior to conducting any monitoring visit, ENI/DGSR/HRDSR will provide the contractor with a minimum of one week's notice. A copy of the monitoring documentation will be discussed with the contractor early in the life of the delivery order. Changes will also be discussed from time to time.

The results of any monitoring visit will be shared with the Contractor. Oral and written debriefings will be scheduled. The contractor will be expected to provide corrective action plans when the identified problem is chronic or of a serious nature.

PERFORMANCE STANDARDS

The services described in the Statement of Work (see attachment 1) will be delivered according to defined performance standards outlined in the tables below.

Effective management of training puts the right people or group of people into the right program to address the right problem, focusing clearly on achieving defined changes in performance. In implementing this complex participant training program where a number of Agency policies and U.S. government laws apply, the contractor shares roles and responsibilities for training outcomes with USAID managers, especially the mission Strategic Objective teams responsible for planning activities to achieve development results.

The highest level of performance accountability, in which the provider is held jointly responsible for training outcomes and/or results, can only be applied when the contractor is involved in, and responsible for, all aspects of the training program from applicant selection in-country to monitoring and placement, and through the follow-on phase. Under this delivery order, that is not the case. While the contractor will be directly involved in the development of the training plan, the Mission will ultimately be responsible for its content. In addition, the contractor will assist with recruitment however selection is still the responsibility of the USAID Mission. Finally, under this delivery order, the contractor will not be fully responsible for the selection of the training provider. The training providers will be identified and their proposals for training shared with the Mission. The Mission will ultimately select the training provider.

Under these circumstances it is reasonable to hold the contractor accountable for ensuring that each of the activities is completed in a timely fashion and according to USAID policies and directives.

Results-based contracting

The following performance indicators distinguish between overall program performance and performance of the component activities. The performance indicators of accountability at the level of program objectives are applicable for all stages of program planning and implementation. Under this delivery order, the contractor will be held accountable for only those elements where the contractor has total control of the process. All the elements are listed in order to provide an understanding of how each fits into the whole. Those performance standards highlighted on the chart are those where the contractor has the most control in the process of training under this delivery order.

Performance indicators for Component Activities are more limited measures of performance in specific activities without reference to longer-term outcomes. Indicators for some Component Activities also include extended component indicators that illustrate the higher level of accountability to which full service contracts would be held.

Outcome-based contracting requires a specific definition of anticipated results of the training. This may be established at the level of individual participants (e.g., returnees will train an additional 25 people), at the organizational unit level (e.g., department will create outreach support activities for newly formed PVOs), at the organizational performance level (e.g., number of companies privatized per year will increase by 10%), at the policy level (e.g., the Ministry of Finance will revise the tax code), or with some other defined focus of activity or change. In each case, it will require a clear understanding of what results are desired and how training can and will contribute to those changes. The contractors' responsibility will be limited to the contribution of training.

Performance standards are distinct from guidance about what constitutes a good training activity. Standards for a good recruitment process might include equity, procedural transparency and an adequate pool of qualified candidates. Actual performance standards go beyond this operational level of quality to the nature and degree of attributable results.

Failure to meet performance standards. Failing to meet performance standards indicated in the three tables following, except as adjusted in individual cases by mutual consent of the contractor, USAID contracting officer and COTR, will result in the contractor being out of compliance until the discrepancy is corrected to the satisfaction of mission COTR.

Table 1 Integrated Participant Support Performance Standards

Task/Element	Performance Indicator	Performance Standard	Means of Verification
Overall Program Objectives			
Achieve mission training objectives	Mutually agreed upon, strategic objective linked, training outcomes at the country, organizational, or individual participant level are achieved	Overall training program outcomes and objectives are achieved Institutional objectives are met and intermediate development outcomes achieved	Program evaluation
Component Activities			
1 Training plan development	USAID and contractor develop mutually acceptable training plan, linked to Mission strategic objectives, training strategy, training plan, selection criteria, and anticipated outcomes	Training plan, linked to mission strategic objectives, is submitted for acceptance by Mission within 60 days of contract signing for first year, and by September 1 for each subsequent year Performance indicators must be included in the training plan	Records and files
2 Recruitment and selection	Candidates who meet training plan requirements are recruited and selected	Recruit candidates that meet requirements set forth in training plan and recommend selection to Mission ensure gender and target population goals are met	Contract database Annual - Workplan

Task/Element	Performance Indicator	Performance Standard	Means of Verification
3 Training program development	Training Agreements are developed, specific training plans for participants, groups, and organizations are designed to meet mission and participant objectives and agreed upon using a participatory process	All Training Agreements have mutually agreed upon, defined, verifiable outcomes Agreements relate to annual training plan and strategic objectives Organizational (institutional) plans reflect coordinated training for individuals and groups	Exit evaluation Contract evaluation Training Agreement records
4 Pre-program preparations	All required preparations are accurately completed on time so as not to delay the training program	100% of participants funded through this delivery order have adequate documentation and approvals as indicated in the SOW	Quarterly reports and contractor monitoring
5 Pre-departure orientation	Participants are adequately prepared to benefit from the training program	90% of participant cluster are satisfied that they were adequately prepared for the program	Exit questions

Task/Element	Performance Indicator	Performance Standard	Means of Verification
6 Placement and monitoring	<p>Participants are placed in programs that directly respond to the training needs and prepare them to accomplish the objectives</p> <p>Placement and cost reduction goals are met</p> <p>Problems are quickly identified and resolved by the contractor</p> <p>Program logistics, allowances, and support are adequately managed</p>	<p>90% of participant cluster are satisfied that the training program met its target objectives</p> <p>All HBCU and other placement requirements are met</p> <p>95% of participant cluster report no problems with support and logistics</p> <p>Implementation of cost reduction plans results in mission targeted cost reductions</p>	<p>Exit questionnaires</p> <p>Financial reports and evaluations</p>
7 Enhancement activities (leadership, cross-cultural training, community immersion, etc)	<p>All programs include enhancement activities that support the primary technical aspects and long term objectives of the training</p>	<p>90% of participant cluster are satisfied with the non-technical aspects of the program</p> <p>90% of participants believe that the enhancement activities improve the impact of training</p>	<p>Exit questionnaires and post return surveys</p>
8 Management	<p>Contractor meets all implementation schedules and workplans</p> <p>Training programs are completed on schedule with accurate and up-to-date program and financial documentation</p>	<p>Required reports and data transmissions are accurate and timely</p> <p>Program completion goals are met</p> <p>Programs are completed on schedule</p>	<p>Regular reports</p> <p>Compliance evaluations</p>

Task/Element	Performance Indicator	Performance Standard	Means of Verification
9 Re-entry	Trainees return home and fulfill terms of post training activity in the Training Agreement	90% of trainee cluster are in jobs applying their skills appropriately	Evaluations and reports
10 Follow-onactivities	Follow-on activities reflect stakeholder's needs, as delineated in the Training Agreement and increase sustainability and impact of training	90% of participant cluster have been invited to participate in follow-on activities and 50% actually are involved within the first year Follow-on significantly extends and reinforces the impact of training	Evaluations, case studies, reports

Table 2 Contracting for Separate Elements of the Integrated Package of Services Performance Indicators and Standards

Task/Element	Performance Indicator	Performance Standard	Means of Verification
1 Training plan development	USAID and contractor develop mutually acceptable training strategy, training plan selection criteria and anticipated outcomes	Training plan, linked to strategic objectives is completed and mutually accepted prior to deadline	Records and files
2 Recruitment and Selection	Qualified candidates are selected on schedule to meet specified training plans	Recruitment goals are met	Contract database and Annual Workplan
3 Training program development	Training Agreements are prepared	Training Agreements have defined outcomes	Exit evaluation Contract evaluation
4 Pre-program preparations	Requirements are completed on time	100% of participants have adequate documentation	Regular reports and contract evaluation

Task/Element	Performance Indicator	Performance Standard	Means of Verification
5 P.e-departure orientation	Participants are prepared to benefit from the training program	90% of the participant cluster were satisfied that they were prepared	Exit questionnaire

Task/Element	Performance Indicator	Performance Standard	Means of Verification
<p>6 Placement and monitoring</p>	<p>Participants are placed in programs that directly respond to the training request Placement opportunities are identified at HBCU institutions in sufficient numbers to allow Missions to meet HBCU placement targets Training plans developed jointly with the USAID Mission reflect a sensitivity to gender goals by including programs which will attract qualified females Cost reduction plans are presented Program logistics, allowances, and support are managed adequately Problems are quickly identified and resolved by the contractor</p>	<p>90% of participant cluster are satisfied that the training program met the request Mission approved HBCU training is programmed Mission agreed upon cost reductions are achieved 95% of participant cluster are satisfied with logistics and support A minimum of 50% female participation is achieved</p>	<p>Monitoring and evaluation reports Financial reports and cost-savings reports</p>

Task/Element	Performance Indicator	Performance Standard	Means of Verification
7 Enhancement activities	Enhancement activities support the training objectives	90% of participant cluster are satisfied with the non-technical aspects of the program 90% of participant cluster believe that the enhancement activities improve the impact of training	Exit surveys
8 Management	Contractor meets all implementation schedules and workplans Contractor maintains accurate and up to date records on all program and financial activities	100% of required reports are accurate and timely Contractor responds to ad hoc USAID information requests within 48 hours 95% of training programs are completed on schedule	Regular reports Compliance evaluation
9 Re-entry	Trainees return home and are assisted in re-integration	90% of participant cluster report re-integration activities were useful	Follow-up surveys
10 Follow-on activities	Returnees participate in follow-on events	90% of returnees in cluster have opportunity to be involved in follow-on activities	Follow-up surveys

Table 3 Technical Assistance Performance Indicators and Standards*

Illustrative Task	Performance Indicator	Performance Standard	Means of Verification
Planning and Strategy Development	Training Strategies are developed that show specific, verifiable outcomes with clear linkage to strategic objectives	Training strategies result in coherent focus on impact for all mission training 95% of missions receiving services are satisfied with services	Mission questionnaires Periodic program evaluations
Develop informational or training materials and publications	Products are consistent with SOW requests Products are used by missions	All materials are widely distributed and used Missions/initiating offices are satisfied with services	Survey of initiating office

Illustrative Task	Performance Indicator	Performance Standard	Means of Verification
Develop standardized programs and guidance	Product responds to SOW request	Missions are satisfied with deliverable Quality and cost containment features result in mission use	Mission questionnaires
Training Provider Evaluation	Evaluations identify key issues and propose solutions Evaluations respond to client information needs	90% of missions are satisfied that the evaluations are useful	Surveys
Workshops, seminars, conferences, and other training for USAID personnel, contractors, training providers and/or other stakeholders	Attendance at these training activities improves USAID personnel capability to manage training programs	90% of attendees in conferences and workshops are satisfied with content 80% of attendees apply new ideas in program management and other appropriate outcomes	Exit questionnaires

ARTICLE V -TECHNICAL DIRECTIONS

(a) Relationship with USAID's Bureau for Europe and New Independent States, Office of Democracy, Governance & Social Reform, Human Resource Development and Social Reform Division

The Contractor will work with ENI/DGSR/HRDSR to carry out specific objectives of the contract under overall supervision of the Contracting Officer's Technical Representative (COTR)

The COTR will

- (1) have general oversight on contractor performance related to the delivery orders,
- (2) receive evaluations of contractor performance submitted by mission/Bureau TLO stated in each delivery order, and, as necessary, take appropriate steps to correct problems,
- (3) review copies of contractor reports to missions,
- (4) review contractor performance for compliance with ADS Ch 253 policies, and
- (5) ensure that the contractor complies with reporting requirements, including transmission of data related to participants

It is also anticipated that the contractor will work together in a cooperative fashion to present information, to assist G/HCD/BELS to gather lessons learned and to improve the Agency training program

G/HCD will provide the contractor with information on USAID policy and policy changes, training strategies and plans, ADS Ch 253 changes, and other relevant matters in a timely manner

(b) Relationship with Bureau's COTR

The Contractor will receive technical direction from the designated COTR in the Bureau. The Contractor will appoint a DO Manager who must have adequate background and skills to function effectively, i.e., have a solid understanding of human resource constraints to development, how training can meet those needs, as well as skills in planning and implementing training activities

The Bureau's COTR will provide the necessary information to the Contractor's DO Manager to enable the contractor to provide services and oversee performance according to the DO. Considerable dialogue is expected between the designated COTR and the contractor's DO Manager or other representative(s) to ensure that each mission's investments in training is cost effective, of high programmatic quality and designed and measured for impact.

(c) Contractor Interface

The work of the Contractor requires interface with other contractors having responsibility for training, such as in existing technical assistance contracts.

INSPECTION AND ACCEPTANCE

USAID inspection and acceptance of services, reports and other required deliverables or outputs shall take place at any location where the services are performed and reports and deliverables or outputs are produced or submitted.

ARTICLE VI - TERM OF PERFORMANCE

- A The effective date of this delivery order is May 1, 1997 and the estimated completion date is September 30, 1999.
- B Subject to the ceiling price established in this delivery order and with prior written approval of the COTR (see block number 5 on the cover page), the contractor is authorized to extend the estimated completion date, provided that such extension does not cause the elapsed time for completion of the work, including the furnishing of all deliverables, to extend beyond 30 calendar days from the original estimated completion date. Any extension may not exceed the completion date of the core contract. The contractor shall attach a copy of the COTR's approval for any extension of the term of this delivery order to the final voucher submitted for payment.
- C It is the contractor's responsibility to ensure that the COTR-approved adjustments to the original estimated completion date do not result in costs incurred which exceed the ceiling price of this delivery order. Under no circumstances shall such adjustments authorize the contractor to be paid any sum in excess of the delivery order.

- D Adjustments which will cause the elapsed time for completion of the work to exceed the original estimated completion date by more than 30 calendar days must be approved in advance by the Contracting Officer

ARTICLE VII - WORK DAYS ORDERED

- A See Table at Attachment 2 to this Delivery Order The "Notes" referred to in this table are references to budget notes which are not a part of this delivery order

The daily rates are based on fixed daily rates, as negotiated All rates quoted are specified in the contract for each respective labor category, in accordance with the basic contract, Section B 3 (a)(3)

The daily rates shown in the table are burdened in accordance with the basic contract, Section B 3 (a)(1) The individuals' basic daily (unburdened) rates have been escalated by 4% per year under this Delivery Order, for budgeting purposes The actual billing rates will be adjusted each year per the COLA adjustments granted to GS Government employees, in accordance with the terms of the basic contract, Section B 3 (a)(1)

- B Key Personnel (pursuant to Section F 8 of the basic contract) are those indicated below

Contract Manager - Keilson

Sr Project Director/Delivery Order Manager - Davies

Field Services Manager/Project Development Spec 3b - Blevins

Regional Program Manager/Program Development Spec 4b - Posner

- C Subject to the ceiling price established in this delivery order and the prior written approval of the COTR, the contractor is authorized to adjust the number of work days actually employed in the performance of the work by each position specified in this order The contractor shall attach a copy of the COTR's approval to the final voucher submitted for payment
- D It is the contractor's responsibility to ensure that the COTR-approved adjustments to the work days ordered for each functional labor specialist do not result in cost incurred which exceed the ceiling price of this delivery order Under no circumstances shall such adjustments authorize the contractor to be paid any sum in excess of the ceiling price

ARTICLE VIII - CEILING PRICE

For Work Days Ordered	\$ 7,221,125
For Other Direct Costs	\$ 3,048,573
For Participant Costs	\$14,902,937
 Ceiling Price	 \$25,172,635

The contractor shall not be paid any sum in excess of the ceiling price

ARTICLE IX - BUDGET

See the detailed budget attached to this Delivery Order (Attachment 3)

The inclusion of any dollar amount in the above budget does not obviate requirements for approval as specified in the basic contract under which this delivery order is issued

If, at any time 75% of either the estimated cost or total level of effort specified under this Delivery Order is reached, or at any time precedent to either event and it appears that additional funds and/or level or effort is required to complete performance, the contractor shall notify the Contracting Officer in writing. Such notification shall include the cost and level of effort expended and that which will be required to complete performance. Such notification does not authorize the Contractor to proceed with increased cost or effort, however, the Government shall have the right to modify the Delivery Order accordingly

ARTICLE X - USE OF GOVERNMENT FACILITIES AND PERSONNEL

The contractor and its employees or consultants are prohibited from using U S Government facilities (such as office space or equipment), or U S Government clerical or technical personnel in the performance of the services specified in the delivery order, unless the use of Government facilities or personnel is specifically authorized in the order, or is authorized in advance, in writing, by the Contracting Officer

ARTICLE XI- EMERGENCY LOCATOR INFORMATION

The contractor agrees to provide the following information to the Mission Administrative Officer on or before the arrival in the host country of every contract employee or dependent

- A The individual's full name, home address, and telephone number
- B The name and number of the contract, and whether the individual is an employee or dependent
- C The contractor's name, home office address, and telephone number, including any after-hours emergency number(s), and the name of the contractor's home office staff member having administrative responsibility for the contract
- D The name, address, and telephone number(s) of each individual's next of kin
- E Any special instructions pertaining to emergency situations such as power of attorney designees or alternate contact persons

ARTICLE XII- DUTY POST

The Duty Post for this delivery order is the U S A , Europe, and the Newly Independent States

Services under this delivery order will be provided in the following locations

Washington, D C	- Main Office
Albania, Tirana	Full Service Field Office
Bosnia, Sarajevo	Full Service Field Office
Bulgaria, Sophia	Full Service Field Office
Croatia, Zagreb	Full Service Field Office
Hungary, Budapest	Full Service Field Office
	Regional Office
Lithuania, Vilnius	Full Service Field Office
Latvia, Riga	Full Service Field Office
Macedonia, Skopje	No in-country office
Poland, Warsaw	Service only other TA contractors
Romania, Bucharest	Full Service Office
Slovakia, Bratislava	Full Service Office

ARTICLE XIII - LANGUAGE REQUIREMENTS

The language requirement for this delivery order is English

ARTICLE XIV - ACCESS TO CLASSIFIED INFORMATION

The contractor will not have access to classified information

ARTICLE XV - LOGISTIC SUPPORT

The contractor shall supply all logistic support, with the exception of any Government Furnished Equipment (GFE) GFE which was funded under the preceding PIET contract and which is usable hereunder, will be transferred from the PIET contract to this Delivery Order The contractor is responsible for working with PIET to develop a comprehensive list of the usable GFE This list shall be submitted to the Contracting Officer for within 30 days of the effective date of this delivery order The Contractor will then be responsible for maintaining the inventory records for the approved property

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ARTICLE XVI - WORK WEEK

The length of the work day for individuals providing/performing services overseas shall coincide with the work day for employees of the USAID Mission or U S Embassy and/or the in-country personnel associated with performance of the work The length of the Contractor's U S work day shall be in accordance with the Contractor's established policies and procedures and shall not be less than 8 hours Under no circumstances will overtime or premium pay be allowed

ARTICLE XVII - APPLICABLE GENERAL PROVISIONS AND MODIFICATIONS

The content of this Delivery Order shall include these stated Articles, and the Contractor's submitted cost and technical information related to this Delivery Order The Order of precedence for performance hereunder shall follow this sequence of documents Clauses incorporated by reference into Contract No FAO-5855-I-00-6020-00, existing at contract award and as may be modified, are specifically applicable to this Delivery Order as well In the case of any conflict in provisions or requirements under this Delivery Order with any portion of the basic contract, the basic contract provisions and requirements shall control

ARTICLE XVII - AUTHORIZED GEOGRAPHIC CODE

The geographic code applicable to procurement of goods and services hereunder is 935, except as otherwise restricted by the terms and conditions of the basic contract

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Attachment 1

STATEMENT OF WORK

PARTICIPANT TRAINING PROJECT FOR EUROPE

SCOPE OF WORK- GENERAL

USAID maintains a directive system covering participant training policy and procedures under USAID's new Automated Directives System (ADS), as Chapter 253 which also covers in-country training. The contractor will be formally responsible for fully implementing and adhering to the contents of ADS Ch 253 unless case-by-case waivers are granted. Documentation must be created and maintained to assure and support this full compliance. Any situations arising in which the ADS chapter cannot be followed must be fully explained, justified, and documented in writing. Copies of ADS Chapter 253 are available on the USAID Gopher.

In-country training While the majority of activities under this delivery order will probably relate to participant training, in-country training activities can also be executed under this contract. In-country presence for the implementation of certain elements under this award are required as delineated.

Participant Training Process

In keeping with ADS 253, the contractor will serve as the single Mission training contractor to carry out operational training duties. The participant training process under this delivery order involves providing full services for those trainees whose programs are funded under the delivery order and processing services for those trainees whose programs are funded through other technical assistance contractors.

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- (a) Planning and Strategy Prior to any training activity, missions are encouraged to conduct a needs assessment to determine the human resource constraints to meeting their strategic objectives and to prepare a comprehensive training strategy that will develop the human resources necessary to achieve strategic goals. This strategy should include a review of existing training activities available within the four Global Bureau Centers of Excellence (ENV, EG, PHN, DG), and the mission's regional bureau, so as to integrate those potentially useful activities and strategies wherever possible into mission training strategies. At this stage it is important to link the training modality and content to development objectives for training and to develop indicators that will measure progress and success.

The needs assessment, and subsequent recruitment, selection, testing, documentation, orientation, other participant processing details in the field, and follow-on activities, take place cooperatively among participants, their employers, USAID missions (especially strategic objective teams), host governments, educational institutions, and/or local private entities (collectively referred to as "stakeholders"). All aspects of training need to be planned and implemented in a manner that maximizes potential impact.

These components include considerations of institutional training capacity and critical mass of trainees for maximum impact, along with appropriate training modalities and venue (in-country, U S , or third-country), and, when appropriate, possible host country policy reform. Involvement of the training contractor in all of these processes will help to ensure the integration of training into the larger development picture.

In keeping with directives of ADS 253, USAID Training Document, each Mission will designate a Human Capacity Development Manager whose responsibility it is to oversee all training related activities. The contractor will work closely with each USAID mission Human Capacity Development Manager and with respective Strategic Objective teams in planning and implementing training activities.

- (b) In-country Services As mentioned above, the contractor will provide full services to and for participants funded under the contract. These services include assistance with the needs assessment process, development of selection criteria, recruitment and selection of participants, working with key target organizations and assistance in development of training plans. Prior to departure and in the planning of the training program, participants and appropriate stakeholders will need to prepare and agree upon an action plan, or Training Agreement (See ADS Ch 253, SR)

The Training Agreement will describe the training to take place, how the training will facilitate meeting development objectives, and how the skills, knowledge and attitudes gained as a result of training should be applied at the worksite. It will be the responsibility of the contractor to ensure that participants have developed this action plan in concert with their institutions and other stakeholders as appropriate, so as to begin thinking about their new role prior to leaving home.

Those participants who are processed as a service to other technical assistance contractors will not be provided the same range of services as their training programs will be planned by the technical assistance contractor and responsibility for integration of that training will rest with the technical assistance contractor.

Training program development, English language testing, assistance in selection of in-country or U.S. preparatory courses, medical examination and certification, and preparing participants' visa applications for USAID signature and U.S. Consular Officer determination will be required under this contract. Other requirements include making travel arrangements, arranging for participant homestays/lodging, escorts and/or interpreters, and ensuring that pre-departure funds are available.

The pre-departure orientation is a critical component in successful training activities. It sets the stage for training and establishes expectations for its outcomes. It outlines cultural, climatic, legal and academic/technical differences. It defines participant responsibilities, develops the appropriate linkages between participant, host institution, USAID strategic objective teams and to the extent possible, the training provider. Pre-departure also provides the participant with the information he/she will need in the U.S. The pre-departure orientation, an important cornerstone of the in-country services to be provided under this contract, also provides the opportunity to review with each participant and complete all necessary pre-departure documentation.

The follow-on phase of a training program is the most critical ingredient for an integrated training approach. It is here that USAID and/or the training contractor assists returnees with implementing their action plan, works with returnees and institutions to ensure that training skills are put to good use, helps returnees with re-entering their jobs and their communities, and, in general, in implementing the new skills, knowledge, attitudes and values gained from or through the training experience. Effective follow-on activities include monitoring/reinforcement of returnees' re-entry to the worksite, providing returnees with access to technical seminars, networks of peers and other professional development events, career planning and development workshops, or newsletters, shared access to journals and books, community development activities, etc. During the follow-on period, the contractor will be able to assess the results of training and ascertain whether it is contributing to broader development objectives.

- (c) **U S or Third-Country Based Services** Services provided to participants in the U S or third countries ensure that the training experience is a beneficial one. This requires appropriate communication with the mission representative, as well as management and logistical support by the contractor. The contractor will be expected to program and monitor participants in full accordance with ADS Chapter 253.

These services include maintaining records with standard data elements and electronic transmission as requested by USAID, planning training activities in line with strategic objectives, providing cost information, identifying and utilizing Historically Black Colleges and Universities (HBCUs) and other minority serving institutions, tracking participant costs, monitoring and evaluating progress of participants, enrolling participants with the designated USAID health plan, preparing and filing income tax returns, and preparing for re-entry to the home country, among others.

In the case of Macedonia, where the contractor is not performing in-country services involving pre-training activities and documentation, the contractor will receive complete documentation on training requests for each participant or group of participants from the mission technical liaison officer (TLO). The contractor will also be provided with the Training Agreements developed in country and sufficient information on the missions strategic objectives and activities in order to program and monitor training.

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Training requests as specified by missions are included in Attachment A Documentation for specific individuals or groups of individuals will be transmitted to the contractor Because of the complex nature of this documentation, the contractor may be called upon to assist the Mission in the development of the training objectives which meet strategic objectives

C 5 SCOPE OF WORK - SPECIFIC

(a) Contractor Responsibility - General

As training is a means to an end, rather than an end in itself, the objectives of the training will drive its planning, implementation, and monitoring The guiding principle in selection of a training program or study tour should be to find the most appropriate and cost effective training to meet the strategic objective of the program under which it will take place

The contractor will analyze each training request with a view to determine

- whether the training will alleviate human resource constraints to development,
- whether the host institutional environment of the trainee is open to the application of new skills and attitudes, and
- to find the best match of U S third country or, when appropriate, in country, institutions to meet the programmatic needs of the host country and USAID mission

The Contractor should take into account the academic and technical resources available from the provider as well as the capability to meet the special programming needs of an integrated training program for the USAID-sponsored participant In cases where the mission has already identified a specific provider for the requested training, the contractor placement specialist is to inform the mission, if possible, of alternative program providers able to meet the same training objectives with equal effectiveness but at lower cost

The contractor must comply with all U S Government policies related to participant training. Among these policies are requirements for cost-reduction, the use of HBCUs, and equity of training opportunities for women.

Cost-containment is a most important facet of the training program. The contractor will seek cost sharing/cost reduction opportunities in its internal management as well as in negotiations with training provider(s) and other service providers. The contractor will be encouraged to be creative in its approach to cost issues, e.g., by combining in-country with U S training modalities, by using homestays (if possible) instead of institutional housing arrangements, by using distance education techniques, alone or in combination with U S training, and by identifying appropriate in country or third country substitutions. The contractor will include cost reduction or cost sharing data in all regular reports to the mission technical officer. Each response to a DO request must include a cost containment plan for implementing services thereunder.

U S Government policy is to strengthen the capacity of HBCUs to provide quality education, and to increase opportunities to participate in and benefit from Federal programs. To conform to this policy, USAID requires that no less than 10 percent of newly programmed U S based training months will be provided by HBCUs. USAID also pays special attention to the use of other minority serving institutions, although there are no established targets of participation in the program at this time. The programming and placement contractor(s) are responsible for developing and maintaining communication linkages between the globally dispersed missions and the hundreds of U S training providers. The contractor is responsible for identifying training opportunities at HBCUs and other minority serving institutions, but the Mission will choose the training programs their participants will attend.

It is also U S Government and USAID policy to ensure equal opportunity and participation of women in international training programs. The number of women participants from any given country should be targeted to the recommendations in the ADS, currently targeted toward 50% participation. BELS and its programming and placement contractor must work with training providers to develop new programs and adapt existing programs to better suit the training needs of women and the Women in Development (WID) strategies of particular missions. USAID encourages the use of women as training providers, provision of support services for women, and the inclusion of gender awareness modules throughout the training program, including orientation, community service, cultural activities, and re-entry planning.

(b) Contractor Responsibilities - Specific

The contractor will provide services that are in direct support of training for development of Eastern Europe. This will, in most cases be provided by an integrated package of services designed with that goal in mind.

Minimum performance standards are spelled out at the end of this section. Section F details the reporting requirements.

(1) **CLIN 0001 - INTEGRATED SERVICES PACKAGE**

The full integrated services package will be provided to the following Missions: Albania, Bosnia, Bulgaria, Croatia, Hungary, Lithuania, Latvia, Romania and Slovakia. These services will include the in-country core services of 1) defining human resource constraints to meeting development goals, 2) developing training strategies to alleviating those constraints, 3) developing specific training plans, 3) implementing recruitment, selection, orientation, and preparation processes, 4) facilitating follow-on activities and 5) monitoring performance. Services may be provided by U S staff based in-country, by in-country resident staff, by local institutions contracted for such services, by periodic country visits, or other arrangements (or combinations of the above) as necessary and appropriate given the mission portfolio and interests. The Mission in Macedonia declines to have these services provided through resident in country staff and will be assisted by staff from Bulgaria and from the Regional WL Office. Poland will only require processing and data collection services for other technical assistance contractors.

U S services include all monitoring and support activities, program enhancement and management for Participants funded under the delivery order. This means that these services will not be provided for those participants processed through the Poland office.

Below is an illustrative list (not exhaustive) of elements that contribute to training for development and that the contractor must take into account in fulfilling ENI Bureau's requirements for Central and Eastern Europe. To Assist in the development of an appropriate budget, a chart is attached detailing the numbers of persons or actions that need to take place to fulfill the requirements of this DO. See Attachment D, Functions Required.

Element 1 Training Plan Development

- 1a The contractor will assist missions in developing their training strategy, including needs assessments, if necessary, and in formulating and/or finalizing their training plans based on Mission defined training projections. Country training strategies need to 1) identify human resources constraints to development, 2) assess whether institutional environments are receptive to change, 3) define, at least at the macro level, the anticipated development outcomes from training activities and 4) develop a country training plan. **10 of the 11 participating countries will require this assistance.**
- 1b During the development of the country training strategy importance should be given to the most appropriate location of the training. For example, the assessment will need to ascertain whether local institutions have the capability to develop the necessary human resources, whether third country institutions offer particular advantages for training, and whether U S participant training is required to alleviate the human resources constraints to development. The issues of critical mass requirements and training of trainers also need to be addressed in the assessment stage to ensure that all expenditures related to training are put to the best possible use.

This delivery order will support the services of an individual to assist the Missions in the Region to identify third country training providers and also to ensure that training offered by these providers is of the quality required by USAID

Element 2 Recruitment and Selection

- 2a Identify types of participants and qualifications necessary to achieve training strategy goals in consultation with USAID officials **This must be a consideration during the training planning process**
- 2b Develop and implement recruitment strategy to meet USAID mission program requirements Screen candidates and present finalists to selection committees Establish selection criteria, procedures, organize selection committee and or sit on recruitment panels
- 2c In concert with USAID, identify and work with key institutions (such as government ministries or other organizations that would benefit from human capacity development and training) and potential contacts in target areas to facilitate appropriate recruitment and selection
- 2d Maintain complete documentation of recruitment and selection process to ensure that our processes are "transparent"

Element 3 Training Program Development

- 3a Design individual or group training program in consultation with the participant, the sponsoring organization and other stakeholders In concert with the participant and other stakeholders, develop specific training objectives and expected activities after return that take into account the strategic objectives of the mission The result will be a Training Agreement that clearly establishes the training objectives and the expectations and responsibilities of all involved parties
- 3b In concert with stakeholders, develop indicators that will track performance and potential impact

- 3c Identify requirements for cultural activities/homestays, observation visits, on-the-job training, and other supplemental activities to include in training request. Supplemental activities must be integrated into the professional training program and tied to training objectives. USAID is not prepared to sponsor costly cultural events and therefore the contractor should attempt to identify local and community activities which reinforce the message of democracy and civic participation.
- 3d Prepare detailed training request and transmit to the U S programming staff adequately in advance of anticipated training date. There is no anticipation that academic programs will be initiated under this delivery order however there is no prohibition against academic training if properly planned and justified. Because of the documents required, there needs to be a minimum of six months lead time to ensure that a satisfactory placement is accomplished.
- 3e Review recommended program with participant, revise program, if necessary, and return to U S programming staff.

Element 4 Pre-Program Preparations

- 4a Arrange for administration of, scoring, and follow up on approved standardized test of English language proficiency (ALIGU, CEPA, TOEFL) and other pre-program testing requirements (GRE, SAT, GMAT, etc).
- 4b Provide scores to USAID and include in participant files.
- 4c Arrange for interpreter or escort services for individuals/groups not meeting the language requirements, when requested.
- 4d Medical testing and clearance. Provide participant with approved medical examination forms, ensure that the forms are correctly completed, maintain appropriate records, and provide forms to USAID as required.
- 4e Visa arrangements. Complete the IAP-66A form for signature by designated USAID representative. Assist participant to complete visa application to the U S Consul if necessary.

- 4f Travel and Housing Arrangements Provide for all travel arrangements to the U S (**for participants funded under the PTPE project Technical Assistance contractors using the services of World Learning will be responsible for making their own arrangement for participant travel**) or elsewhere (round trip) and transit visas if required Arrange for appropriate housing according to mission specifications as requested, which may include homestays for purposes of cost containment or cultural immersion
- 4g Maintenance Advance Arrange for participants to receive required funds prior to leaving the home country
- 4h Complete required data forms and other required documentation (Conditions of Training, power of attorney, etc) and send to appropriate USAID office Forms see Ch 253, SR, Sec 3 Appendix
- 4i Assist participants (**PTPE funded**) with Federal, state and local tax forms and assure that filings take place as appropriate in accordance with country tax treaties

Element 5 Pre-departure Orientation

- 5a Arrange and conduct briefings and orientation for all participants The contractor will present an outline of the orientation package and materials to ENI/DGSR/HRDSR upon the signing of this agreement The orientation package will be reviewed to determine if it meets the following minimums
- Discussion of two-year residency requirement in home country after return before eligibility for permanent residence in the U S
 - Full information about the content, instructional approach, logistics and schedule of the training program
 - Detailed travel and transportation information to cover all aspects of international and domestic travel
 - Information about the training location
 - Detailed explanation of training program finances, expenses, what the participant will receive, when, and what it must cover what expenses will, and will not, be reimbursed by the program

- Participant responsibilities Discussion of laws, regulations, and procedures that will affect the participant
- Detailed information on handling emergencies while in the U S Medical coverage, contact numbers, legal problems, etc
- Basic information about cultural expectations and differences in the U S
- Familiarization with mission strategic objectives and how the training and individuals will contribute to meeting objectives

The orientation package used must be standard for the Delivery Order and reviewed biannually to ensure that policies are current

Element 6 Placement and Monitoring

- 6a Identify appropriate and cost-effective training opportunities Training opportunities may include scheduled academic programs, existing technical training programs, or specially tailored training, observational/study tours, internships, interviews with U S private sector representatives, on-the-job training and entrepreneurial training Generally entrepreneurial training will be provided under the EMED project The contractor will generally be required to solicit for training services The contractor will identify several options for each training activity and recommend the most cost effective alternative There will be instances where training is a continuation of an existing technical assistance activity in-country and where to move to a different training provider would weaken the effect of the training In these cases, documentation must be provided to support this claim and submitted to the TLO for review They should be approved by the USAID Mission as there may be cost implications for not utilizing an alternative training provider Training provided without tuition charge does not have to be competed When training is to take place in country, technical assistance may be needed to strengthen the institution chosen to provide that training This will be part of the function of the third country training coordinator supported by additional resources from the Bureau

- 6b Prepare an training implementation plan (TIP) that describes in detail the proposed training and enhancement activities and the suggested schedule (Once accepted, this TIP could then be part of the Training Agreement) Optional activities not specifically requested by the USAID mission must be identified as such and cost information provided The TIP must be approved in writing by the USAID mission
- 6c Make all administrative arrangements for participant programs, including
- Negotiate cost savings with training provider
 - Arrange for placement (applications, fee payment, course selection, etc)
 - Arrange for all travel and logistical support, including appropriate housing When requested by mission or bureau, arrange for participant homestays near the training site as an alternative to institutional housing solutions Inform mission and participant of travel arrangements and dates
 - Enroll all participants in the required health and accident coverage (HAC) program and adjust as needed for program changes
 - When requested by mission or bureau, arrange for participant homestays in the community near the training site as an alternative to institutional housing solutions,
 - Transmit required participant data to USAID
 - Have participants met upon arrival in the U S or the third country
 - Provide timely payment of all allowances and expenses according to ADS Ch 253 requirements, ensuring that payments are made for legitimate program purposes, generate Statement of Earnings for tax filing on behalf of participants
- 6d Monitor and Report on Participant Progress
- Maintain (and document) regular contact with participants to identify and resolve problems Long term participants should be contacted a minimum of four times each year Procedures should be developed for short-term participants to track activities, attendance, performance, problems, and successful completion of program

- Advise mission on participant progress on a quarterly basis
 - Notify the mission on completion of training program and the date of the participant's return to the home country
 - Inform participants of tax liability, if any, using G/HCD guidance and assure that participants complete and file forms as required
 - Arrange secure approval for, and document extensions and transfers
- 6e Provide cultural and logistics orientation to all participants
Minimum orientation includes
- Review of the Training Agreement prepared in country, including review of training program, training objective, relationship to USAID strategic objectives, and responsibilities of various stakeholders
 - Review program schedule, transportation and logistics
 - Review of all USAID and Immigration and Naturalization Service (U S INS) rules affecting participants, particularly the 2-year return residency requirement before eligibility for permanent residency in the U S
 - Detailed information about daily activities (housing, shopping, food preparation, check cashing, transportation, correspondence, and communication)
 - Orientation to the city, and the training site (geography, attractions, etc)
- 6f Establish evaluation criteria and mechanisms to allow for periodic review of U S and third country training programs
- 6g Provide all participants with approved training evaluation forms and complement written forms with periodic interviews Collect evaluations, analyze and report data
- 6h Maintain evaluations, transmit to missions and have available on file for review by BELS
- 6i Develop evaluation instruments for use with training institutions, trainers, mission staff and other stakeholders involved in the design and implementation of each training activity so that problems and successful interventions can be identified
- 6j Utilize evaluation data on a systematic basis to identify problems and improve programs

- 6k Cooperate and coordinate evaluation efforts with other evaluation activities sponsored by the missions, Bureaus, or BELS. The nature of the coordination of evaluation activities will be negotiated on a case by case basis to ensure adequate evaluation coverage without duplication of effort

Element 7 Enhancement Activities

Supplement technical aspects of training with "enhancement" activities such as cross cultural orientation, cultural activities, community service activities, linkage with an appropriate mentor, participation in management, leadership and/or development workshops or seminars

Element 8 Management

- 8a Maintain complete records
- Relating to participants, including selection criteria, biodata, record of medical certification, English language test scores, visa status, waivers, travel arrangements, advances to participants, as well as attendance at pre-departure sessions, Training Agreements etc
 - On competition and selection of training providers, negotiations, and cost savings achieved
 - Financial data for each program/participant in order to compile average participant costs
 - Maintain individual participant files using a consistent and standardized format and retain files at least twelve months after departure from the United States or third country or after the last bill for training is paid (including federal and states taxes) Transfer files to USAID for retirement
- 8b Maintain database related to participants that meets all USAID data requirements including biographical data, program data, cost data, process data (visa, language, medical, financial, travel,) and participant training months accrued each quarter. Data elements required by USAID must be transmitted electronically

- 8c Provide all required performance and financial reports to USAID
- 8d Maintain records about training providers used, including nature of training, cost reduction and cost sharing, frequency of training, contact person, etc Transmit required data elements to USAID training provider clearinghouse

Element 9 Re-entry

Provide the necessary support for individuals or groups to re-enter their jobs and communities Such activities might include re-entry interviews with the host institution to review the Training Agreement, introduction to community groups involved in development activities and, introduction to others who have had similar experiences

Element 10 Follow-on

- 10a Analyze the follow-on requirements of each participant and/or participant group to identify opportunities to increase the impact and improve the sustainability of the training Provide the results of this analysis to USAID on a regular basis (More extensive follow-on services can be customized for missions and provided under the technical assistance component of this award, see below)
- 10b Maintain current and accurate records on participants' home addresses and current employment after training through the length of the contract

To repeat, those services listed above will be provided for trainees financed through this delivery order Participants managed by other contractors will be processed in-country under the delivery order The services provided for these participants will include English language testing, visa processing, participant data collection (biographical information), collection of medical information, and pre-departure orientation These services will be provided at no cost to other contractors Additional services required by technical assistance contractors will be done on a fee for service basis with the fee structure established by the contractor USAID will not be involved in the negotiation or payment of any of these fees

In- country Pre-Program Academic and Language Preparation

It is not anticipated that academic and language preparation will be part of the scope of this delivery order. The contractor will refer participants to language training centers if they fail to pass standard tests. USAID supports language training through fund transfers to USIA. Because of the short term nature of training provided under this delivery order, there will be no remedial in-country language training required.

Expanded Follow-on Programs

The contractor will develop a follow-on plan for all participants. The plan need not be elaborate but must recognize the follow-on is an necessary part of the training experience. The plan does not have to include the expenditure of additional funds but may tap into the resources already available in-country. Missions may require assistance in developing associations of returned participants, developing a small grants program to returnees for pilot projects related to development, implementing continuing education programs, and developing/maintaining professional and institutional linkages with the U S.

(2) CLIN 0002 - TECHNICAL ASSISTANCE SERVICES

- Publish a quarterly International Training Update highlighting successful and innovative training activities. This update will focus on participant achievements in support of USAID strategic objectives. It will be distributed to USAID CEE Missions (10 copies each), ENI/DGSR/HRDSR (10 copies), and G/HCD (5 copies).
- More informally, the contractor will be expected to provide Success Stories on a monthly basis. The success stories are one way that we are able to "tell our story" to a broad audience. The success story format will be developed within 30 days of the signing of the delivery order.

- Each year the contractor will work with the ENI Bureau, the training monitoring and evaluation contractor, and the prime contractor providing services to the NIS region to present a training workshop. The primary purpose of the workshop will be to review lessons learned, provide updates on a policy changes, share materials developed in support of training, review cost containment efforts, provide training to newly assigned contractor and mission staff. The contractor will be responsible for presenting case studies from eight of the Missions in which they are working which highlight lessons learned, illustrate procedures used to contain costs, and discuss application, spread effect, impact and sustainability of training activities.

REPORTS AND DELIVERABLES OR OUTPUTS

In addition to the requirements set forth in the basic contract for submission of reports in Sections I and J and in the AIDAR clause 752 7026, Reports, the Contractor shall submit the following deliverables or outputs to the COTR specified in Section G 2 of the basic contract

The required reports for all types of delivery order services will include

- (a) **Property Reports** An annual property report must be submitted within 30 days after the end of the reporting period to the Contracting Officer (3 copies). The report must contain the information required by the clauses of this contract entitled "Government Property (Cost-Reimbursement, Time-and-Material, or Labor-Hour Contracts)" (FAR 52 245-05 and "Government Property -- USAID Reporting Requirements" (AIDAR 752 245-70)
- (b) **Operations Manual** An "operations manual" incorporating procedures related to all key program elements will be developed within 30 days of contract award. The contents of the manual will be subject to COTR approval. All ADS Ch 253 changes and any other applicable G/HCD directives must be incorporated into the contractor's "operations manual" within 30 days of the change.

- (c) Implementation Plan for all contracted services is due within 30 days of the execution of the DO. The Plan will include contents/formats of recruitment/selection activities, pre-departure sessions, training plan development and pre-program preparations
- (d) Ad Hoc Reports. Ad hoc reports as requested by the COTR. Copies of reports produced under deliverables will need to be provided to the USAID Mission, BELS and PPC/CDIE

AIDAR 752 7026 - REPORTS (October 1996)

1 Performance monitoring reports (PMRs). The contractor shall submit performance reports summarizing progress of the major activities in process in relation to the requirements of the contract, indicating any problems encountered, and proposing remedial actions as appropriate

a) Performance reports shall be submitted within 30 days of the three-month periods (calendar quarters) ending on March 31, June 30, September 30, and December 31

b) The contractor shall submit the reports to the cognizant Contracting Officer's Technical Representative (COTR) identified in Section G of the Schedule, who will forward the reports to the responsible Contracting Officer

2 Performance evaluation reports (PERs). The CO shall use information contained in the periodic PMRs discussed in paragraph 1, and input from the COTR, to evaluate contractor performance on completion of activities and, for multi-year contracts, on an interim basis

a) The Contractor Performance Report (AID form 1420-66) which will be used to evaluate performance is attached to the Schedule (See list of attachments, Section J)

b) Contractors shall have 30 days to comment on or rebut the assessment, or may simply concur with the assessment by signing and returning the CPR form to the CO

3 No other performance reports shall be required. The contractor, however, shall promptly notify the CO and COTR of any problems, delays, or adverse conditions which materially impair the contractor's ability to meet the requirements of the contract

(End of clause)

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