

PD-AR4-127



AMEX INTERNATIONAL, INC.

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QUARTERLY REPORT OF FIELD SERVICE ACTIVITY

for the period October to December 1993

Submitted by: Lorraine Denakpo, Project Manager
Human Resources Development Assistance Project (HRDA)
(698-0463)

Contract No: AOT-0463-C-00-3215-00

Contract No: AOT-0463-Q-00-3216-00

Contractor: AMEX International, Inc.

AID PROJECT OFFICE: AFR/ONI/TPPI

January 14, 1994

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HRDA ACTIVITIES DURING THE PERIOD OCTOBER TO DECEMBER 1993

Summary

The reporting period is the first quarter of HRDA Project activity under contract no. AOT-0463-C-00-3215-00. During the first quarter of this contract, no overseas field service activities were required of the contractor.

The activities summarized below include core-funded activities carried out in the United States and overseas field service activities (core and buy-in) planned for the second quarter.

1. Briefing of Key Staff

A number of meetings were held during this quarter to brief new contract staff on the HRDA Project and on other training initiatives of the Africa Bureau and AID's Office of International Training. The Project Manager, Private Sector Training Coordinator, and Assistant Private Sector Training Coordinator as well as other AMEX/CAII staff met with their colleagues to discuss coordination and collaboration on various activities.

- ◆ Meeting with ATLAS staff
- ◆ Meetings with AFR/ONI/TPPI staff including a special meeting on MIS issues
- ◆ Meeting with HERNS and OIT staff

2. Disseminating and Coordinating Information among the Missions (Contract clause C.3.c.1)

2A. Production of Newsletter (C.3.c.1.A)

AMEX has provided AFR/ONI/TPPI with a draft of the first quarterly newsletter "DIRECTIONS" which will be published and pouched to Missions by the end of January. This is a core-funded activity.

2B. Planning, Supporting and Conducting Workshops (C.3.c.1.B)

The first of two core-funded workshops will be held in Washington, D.C. in March 1994 for Mission Training and Project Office staff. AMEX has identified possible workshop sites and developed daily objectives and an agenda for the eight-day program. In addition, AMEX prepared a draft cable announcing the workshop to African missions and seeking their input on the proposed agenda.

2C. Disseminating Information on Impact Evaluations

AMEX has prepared copies of the 1993 Cameroon Training Impact Evaluation Report which it will pouch to African Missions in January 1994. This is a core-funded activity.

3. Assisting USAID Missions in Developing Scopes of Work (C.3.c.2)

Based on requests from AFR/ONI/TPPI, AMEX developed draft outlines of requirements for the following scopes of work: A Country Training Strategy (CTS) and A Private Sector Training Needs Assessment (PSTNA). These outline scopes of work will be included with others to be developed and put on diskette for distribution to Missions during the March 1994 workshop. This is a core-funded activity.

4. Providing Training Outreach Services and Technical Field Support (C.3.c.3)

No specific activities or technical support of this nature were provided during the reporting period.

5. Providing Training Management Assistance to Missions (C.3.c.4)

5A. Making Decisions on Training Management

At the request of the COTR, AMEX prepared a draft document to help Missions plan HRD and training activities responsive to their strategic objectives. The final report, "What to do about Training," will be provided to Missions.

5B. Developing Impact Indicators and Impact Evaluation Strategies

At the request of the COTR, AMEX and CAII Project staff participated in a meeting sponsored by OIT on evaluating the impact of USAID participant training. AMEX/CAII staff will participate in a working group of specialists from various contractors and USAID Bureaus to discuss and define impact indicators and strategies for USAID Missions.

5C. Core Support to Benin Planned

AMEX has been advised by AFR/ONI/TPPI that USAID/Benin may require assistance in updating Benin's Private Sector Training Needs Assessment, assessing the capacity of in-country training, and drafting a country training strategy. This assistance is currently being planned as a core-funded activity requiring approximately six person-weeks of effort and costing approximately \$44,036.00. This activity is tentatively scheduled for January or February 1994.

5D. Core Support to Namibia Planned

AMEX has been advised by AFR/ONI/TPPI that USAID/Namibia may require assistance in examining Namibia's capacity to absorb trainees in priority areas, and in drafting a country training strategy and country training plan. This assistance is currently being planned as a core-funded activity requiring approximately eight person-weeks of effort and costing approximately \$56,772.00. This activity is tentatively scheduled for January or February 1994.

5E. Buy-in Support to Zambia Planned

AMEX has been advised by AFR/ONI/TPPI that USAID/Zambia may require assistance in drafting a training impact methodology and to update the Country Training Strategy to link it with the Mission's CPSP. This assistance is currently being planned as an activity under the requirements contract and, pending receipt of a delivery order, is expected to require approximately three person-weeks of effort and cost approximately \$22,474.00. This activity is tentatively scheduled for January or February 1994.

ATTACHMENT : Minutes of Management Review Meetings



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MANAGEMENT REVIEW MEETING MINUTES

January 10, 1994

TO: Paul Knepp, HRDA/COTR
FROM: Lorraine Denakpo, HRDA Project Manager
SUBJECT: Minutes of January 7, 1994 Meeting
ATTENDING: AID/AFR/ONI: Paul Knepp, COTR
AMEX: Lorraine Denakpo, HRDA Project Manager

1. Workshop: The draft agenda for the workshop was discussed as well as the proposed site (the Arlington Renaissance Hotel). The COTR encouraged AMEX to begin marketing the workshop to the Missions. A meeting with AMEX, ONI staff and the ATLAS Project staff on the workshop agenda is planned for January 10.
2. Newsletter: A final draft of the newsletter will be submitted to Paul by January 14 with a cover memo to the Publications Board providing a cost breakdown per issue.
3. Core Travel to Benin: The COTR will provide travel authorization when Benin concurs with proposed team and dates. The team proposed is Andrew Gilboy and Isabel Dillener who will be joined by ONI RSSA Elizabeth Torrey. Tentative dates are January 29 to February 19, 1994.
4. Other Quarterly Travel Plans: The COTR will review Quarterly Planned Travel Report submitted in late December.
5. Domestic Travel: The COTR will determine with the CO how domestic travel should be approved and charged.
6. Regional Field Visits: Lorraine will work with ONI staff to provide Paul with a draft cable for proposing regional field visits for technical services.
7. Team Building Session: A team building session for AMEX, Creative and AFR/ONI staff will be planned soon.
8. Assigning Core Consultants to Domestic Activities: The COTR will provide approval to use approximately thirty days of core staff time for preparing for workshop sessions and developing related materials.

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AMEX MEMORANDUM

MANAGEMENT REVIEW MEETING MINUTES

December 21, 1993

TO: Paul Knepp, HRDA/COTR

FROM: Lorraine Denakpo, HRDA Project Manager *WS*

SUBJECT: Minutes of December 14, 1993 Meeting

ATTENDING: AID/AFR/ONI: Paul Knepp, COTR
Freeman Daniels, Elizabeth Torrey, Rita Wollmering,
Hugh Maney, Barbara Keating

AMEX: Lorraine Denakpo, HRDA Project Manager
Isabel Dillener, Asst. PSTC

1. Newsletter: ONI/TPPI staff made corrections and comments on articles for the quarterly newsletter. Each issue will also contain a pull-out on MIS/PTMS issues. Hugh Maney will provide AMEX with the text for this section. Those present decided to go with "DIRECTIONS" as the title.
2. March Workshop: Several aspects of the workshop were discussed. Dates were scheduled from March 23 to April 1, 1993. The workshop will run from Wednesday to Friday of the following week and will include two full days of MIS (PTMS, GTI, TIMS) activities). Rita Wollmering will work directly with AMEX on developing workshop objectives and planning the agenda. A meeting of Rita, Lorraine and Isabel was scheduled for later that week.

Human Resources Development Assistance Project (698-0463)

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AMEX MEMORANDUM

MANAGEMENT REVIEW MEETING MINUTES

December 6, 1993

TO: Paul Knepp, HRDA/COTR

FROM: Lorraine Denakpo, HRDA Project Manager

SUBJECT: Minutes of December 3, 1993 Meeting

ATTENDING: AID/AFR/ONI: Paul Knepp, COTR
AMEX: Felipe Tejada, Corporate Monitor
Lorraine Denakpo, HRDA Project Manager

1. Private Sector Training Coordinator position: AMEX announced that Douglas Passanisi was no longer available for the position. AMEX is working with Creative Associates to identify another candidate with equal or better qualifications. Paul stressed that Portuguese language skills were essential since Mr. Passanisi would not be approved for short-term core consultancy services.

Those present agreed to meet with the Contracting Officer the following week to discuss the contractual and budgetary implications of replacing Mr. Passanisi.

2. Newsletter: The text draft of the newsletter were discussed. It was agreed to feature USAID more prominently on the first page and reduce the feature about AMEX/CAII capabilities. Paul reviewed what information would be required for AID Publications Review Board.
3. Session on Impact Methodology: Scheduled for Dec. 9 at 1:30. Andy Gilboy and Brenda Bryant will present AMEX/CAII impact methodology.
4. March Workshop: The draft agenda for the workshop was briefly discussed. The ONI staff will review the draft before working with AMEX to finalize the agenda. AMEX will begin gathering information about possible sites for the workshop.
5. Proposal for Core Technical Support to Missions: AMEX presented a proposal for providing quarterly field visits to selected Missions. Paul will discuss proposal with his staff. Lorraine will prepare an estimated budget for such a visit.

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6. Draft SOW for HRDA Evaluation: AMEX will provide a draft by mid-January.
7. HRDA Brochure: AMEX will draft a brochure for the project. It was suggested that the brochure be provided to Missions on diskette in Wordperfect so that each Mission could add country-specific information.
8. The next weekly meeting will take place on December 8, 1993.

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MANAGEMENT REVIEW MEETING MINUTES

November 29, 1993

TO: Paul Knepp, HRDA/COTR
FROM: Lorraine Denakpo, HRDA Project Manager
SUBJECT: Minutes of November 24, 1993 Meeting
ATTENDING: AID/AFR/ONI: Freeman Daniels, Elizabeth Torrey
 AMEX: Felipe Tejeda, Corporate Monitor
 Lorraine Denakpo, HRDA Project Manager
 Isabel Dillener, Asst PSTC
 CAII: Susan Votaw

The purpose of the meeting was to discuss the Training Officers' Workshop planned for March 1994. Those present agreed on the following points:

1. Theme: MANAGING TRAINING FOR IMPACT
2. Audience: HRDA Project and Training Office staff as well as FSN or PSC staff of other Projects with significant training components
3. Format: a Five-day workshop, with possibility for one to two additional days of training if required by individual participants.

Morning sessions would focus on themes and afternoon sessions would provide practical skills training in complementary areas. Some examples of themes discussed were "Increasing rural participation in training," "Programming Choices," and "Responding to the Needs of the Private Sector and Civil Society." Skill areas to be provided would include basic computer skills, writing SOWs for in-country training, setting protocols for advisory boards, etc.

4. Other: Tentative dates (March 9 to 15), possible location, possible field visits, possible speakers were also briefly discussed.
5. Lorraine agreed to provide a draft agenda for AFR/ONI review during the week of Nov. 29 so that an initial offering cable could be sent to Missions the week of December 6th.

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AMEX MEMORANDUM

MANAGEMENT REVIEW MEETING MINUTES

November 22, 1993

TO: Paul Knepp, HRDA/COTR
 FROM: Lorraine Denakpo, HRDA Project Manager
 SUBJECT: Minutes of November 18, 1993 Meeting
 ATTENDING: AID/AFR/ONI: Paul Knepp, COTR,
 AMEX: Felipe Tejeda, Corporate Monitor
 Lorraine Denakpo, HRDA Project Manager

1. Invoices: We discussed what line items should be broken out in invoices as well as billing routes.
2. Financial Reports: It was agreed that AMEX would track the number of foreign nationals trained as part of the semi-annual financial report. Those trained would include foreign nationals who directly benefit from an AMEX/CAII workshop or those who receive one-on-one training from AMEX/CAII during fields visits.
3. Non-Expendable Supplies: AMEX queried Paul on the possibility of modifying the non-expendable property items agreed to in the contract.
4. Travel and Other Direct Costs: The "plug" figures provided in the contract for these two elements were discussed.
5. Core Activities: Progress on newsletter and templates were discussed as well as the planned core activity in Benin. An initial planning meeting for the March workshop will be organized next week with ONI staff.
6. Staffing: The use of REDSO and RSSA staffs for HRDA core and buy-in activities was discussed. Paul advised us that he would take the lead on determining to what extent such staff could be made available. We agreed that Missions should be encouraged to use locally-hired consultants and/or Mission personnel to fill out HRDA teams.
7. Paul and Lorraine agreed to set the time for the next meeting early next week.

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AMEX MEMORANDUM

MANAGEMENT REVIEW MEETING MINUTES

November 16, 1993

TO: Paul Knepp, HRDA/COTR

FROM: Lorraine Denakpo, HRDA Project Manager

SUBJECT: Corrected Minutes of November 10, 1993 Meeting

ATTENDING: AID/AFR/ONI: Paul Knepp, COTR,
 Freeman Daniels
 Elizabeth Torrey

AMEX: Felipe Tejada, Corporate Monitor
 Lorraine Denakpo, HRDA Project Manager
 Andy Gilboy, PSTC

CAII: Susan Votaw, Dede Naylor

1. AID/W news and the possible effects of restructuring on Technical and Regional Offices.
2. HRDA Project Staffing Issues: Lorraine Denakpo, Project Manager began work on Nov. 9, 1993. Isabel Dillener, the Assistant PSTC, will begin on November 22, 1993. Douglas Passanisi, the PSTC, is scheduled to begin on December 15.
3. ONI Staffing: Rita Wollmering will begin work as a RSSA on November 29, 1993. Her title is Public Sector Training Coordinator.
4. HRDA Project Information: Amendment is being prepared. Major evaluation of the project has been budgeted for and is planned for FY 94.
5. Current Requests for HRDA assistance: requests from Chad, Zambia and Benin pending, of which Benin would be core-funded and the others buy-ins. AMEX will work on developing some generic SOWs with details on levels of effort required for Missions, and ONI will be responsible for providing budgeting figures to missions.
6. "Buy-in" Procedures: A STATE cable went out to the Missions. ONI will insist on hard copy PIO/Ts with diskettes. Paul is optimistic that Contracts will issue task orders in a timely fashion.

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7. A cable on PTMS activities and MIS support also went to Missions.
 8. Mission choices: HRDA staff needs to meet with HERNS, ATLAS, and PTMS staffs to understand each program and prepare ourselves (and short-term consultants) to respond to Missions' requests for services. Meetings will start next week.
 9. Newsletter: ONI staff agreed in principle to changes in name, format, style, and focus. HRDA will get a draft of the newsletter with some choices in format and style to ONI by the end of November for approval. The first issue would contain at least the following:
 - information on new staffing for the Project and in ONI
 - a piece on training as a development tool
 - information on PTMS support
 - information on HRDA core services and buy-in procedures
 - reports on ONI activities since the last newsletter
 - a calendar of upcoming events including the March Training Officers workshop
- Paul would like to see cost estimates for various size runs, including cost per issue, for the first newsletter. Elizabeth and Lorraine will look through old Labat files for information on mailing lists.
- For future issues we discussed the possibilities of trying to expand readership through surveys, special issues and issues and/or articles in other languages.
10. Andy Gilboy asked whether he could visit REDSO/WCA on his way back from Benin in November if the Benin program takes place. Paul promised to get back to Andy on that possibility.
 11. It was agreed to set up two meetings. One with AMEX, CAII staff and Hugh Maney and the MIS staff to discuss PTMS, GTI issues. Another meeting will be set up with AMEX, CAII and Aguirre staff on HERNS.
 12. Upcoming ONI activities: Two Agribusiness workshops scheduled for early next year. Two PTMS related workshops planned.
 13. African Training Officers Workshop: March in the Wash DC area. AFR/ONI in charge. Possibly some input from Ron Raphael at OIT. Core-funded. Will include PTMS updates, ATLAS and other training initiatives as well as HRDA issues. Suggest Wed through Tuesday program. Paul would like to see a concept paper a/o December 15. He asked us to start getting suggestions on housing. He will let us know of dates as soon as he can.
 14. Paul and Lorraine will set time for next Weekly meeting and advise others as required.

October 26, 1993

Report of HRDA Meeting of Tuesday, October 19, 1993

Drafted by: Andy Gilboy

Attending:

AFR/ONI - Paul Knepp, Lisa Builder (Contracts), Elizabeth Torrey, Freeman Daniels.

AMEX/Creative - Mori Diane, Lucie Phillips, Andy Gilboy, Joyce LeMelle, and Derry Velardi.

Summary

1. Paul Knepp provided the AMEX/Creative team with a debriefing on AID's review of the technical proposal, outlining its principal strengths and noting some of the weaknesses mentioned during the technical review.

2. A discussion about the procedures which Missions will follow for the requirements ("buy-in") contract were discussed. It was agreed that AMEX would develop a "SOW template" to guide Missions in writing SOWs for a number of tasks which we expect Missions to want. The development of SOWs is a critical procedure which affects the ability of the AMEX team, and AFR/ONI, to provide services to the field. We need to help some Missions at the early stage in identifying the type of assistance they will require.

The procedures are summarized below:

a. A SOW (and, in the case of a buy-in, a PIO/T) is sent to AFR/ONI for action. For actions falling under the requirements contract, the SOW (and PIO/T) will be reviewed by AFR/ONI and sent to Contracts with a request that a "delivery order" be drawn up. Contracts then sends AMEX a letter requesting that the following items be furnished within 10 days:

- * resumes of proposed consultants
- * schedule of how the tasks are to be accomplished
- * a budget for the activity

b. AMEX recruits its consultants, responds to the delivery order request, and submits the proposal within the time limit. Contracts then signs the delivery order and returns it to AMEX. In exceptional circumstances, a verbal acceptance will be given to AMEX followed by the signed delivery order.

Report of HRDA Meeting: October 19, 1993

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c. AMEX will track the costs, LOE and timing of all delivery orders by Mission and present this data in fulfillment of its contractual reporting requirements.

3. Lisa Builder answered questions from AMEX about the types of involvement which AMEX could have in the early stages leading up to a delivery order being signed. Once AMEX learns of an impending delivery order and SOW, it can begin informally lining up consultants without making any commitment that the consultancy will be approved. AMEX can also suggest improvements or changes to the SOW based on its experience in providing similar services for AFR/ONI and the Mission to consider. Delivery orders range from \$20,000 to \$250,000.

4. The start-up dates of the AMEX/Creative project staff were announced: Lorraine Denakpo, on/about November 7. Andy Gilboy would continue to be the key technical contact for the project; Lucie Phillips would serve as AMEX Corporate Monitor until the return of Felipe Tejada.

5. The determination of whether assistance to Missions will be core-funded or be handled through the requirements contract are to be decided by Paul Knepp. AMEX and AFR/ONI will develop guidelines to apply to Mission requests. Some of these are included in the AMEX contract and will be refined further.

6. AFR/ONI has passed on to AMEX information from three Missions (Chad, Benin and Zambia) about assistance they will need over the next few months. AMEX will review these requests and provide AFR/ONI with feedback.

7. Among the first orders of business, once the AMEX/Creative HRDA team is fully operational, will be developing a Work Plan and conducting a "team-building session" for all HRDA project and contract staff.

The meeting was adjourned after approximately one hour.

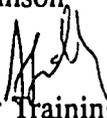


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October 17, 1993

Memorandum

TO: Mori Diane, AMEX
 Lucy Phillips
 Joyce LeMelle
 Jennifer Wilkinson
 Brenda Bryant, Creative
 Susan Votaw
 Derry Velardi for May Rihani

FROM: Andy Gilboy 
 Private Sector Training Coordinator

SUBJ: Summary of Recent Meetings

Kick-off Meeting with AFR/ONI

The following people met on Tuesday, October 12 with Paul Knepp (our Contracting Officer Technical Representative - COTR), head of AFR/ONI/TPPI and the two RSSA project advisors assigned to HRDA: Elizabeth Torrey and Freeman Daniels: Mori Diane, Lucy Phillips, Andy Gilboy, Joyce LeMelle and Susan Votaw. Our A.I.D. colleagues congratulated us for being selected as the core contractor for HRDA. We expressed our excitement about getting started and assembling our team in Washington by early November.

The following points were made:

- ◆ Paul noted that our HRDA project will need to be marketed since there are several new projects which offer Missions similar services. These are HERNS (Human Education Resources Network Support), the newly-revised PIET contract with OIT, and (to some degree) ATLAS. Missions may become confused with the overlapping array of activities to which they can buy in, and it will be our responsibility to help Mission staff understand the advantages of HRDA.
- ◆ Some expressed the notion that HRDA will continue to be the "project of choice" since Missions know it and it is operated through AFR rather than OIT.
- ◆ There may be pent-up demand for HRDA-managed assistance to the field (PSTNAs, CTS, training evaluations, etc.) to which we will need to respond rapidly, so as not to discourage the Missions in using HRDA.
- ◆ AFR/ONI is beginning the process of extending the PACD for HRDA for two years beyond September 30, 1995.

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- ◆ Lorraine Denakpo, the proposed HRDA Project Manager, is expected to be in Washington ready to begin prior to November 15.
- ◆ Doug Passanisi is in Mozambique. Creative will contact him for an update of his expected return date.
- ◆ AFR's Office of Operations and New Initiatives (AFR/ONI) has the following sections:
 - ◆ TPPI - Technical Projects and Program Implementation Division, in which both the HRDA and ATLAS projects are supervised: Paul Knepp, Acting Chief (title?);
 - ◆ DG - Democratization and Governance Staff: Bob Schumacher, Chief.
 - ◆ PSD - Private Sector Division Staff: Mike Unger, Chief (Neil Billig is in this division also).

The Director for AFR/ONI is William Kacheck (sp?), former USAID Mission Director in Guinea. The Deputy Director is William Anderson.

- ◆ Barbara Keating is the MIS contact overseeing the PTMS work on HRDA. We should coordinate HRDA field services carefully with her.

(NOTE: The MIS component under HRDA, which was formerly managed by Labat-Anderson, has been excised from the new core contract with AMEX and was awarded separately on a short-term, temporary contract to (coincidentally) AMEX and a subcontractor. The subcontractor, Info Structure International, is a firm whose principals are Peter Gallagher and David Hunsberger, the PTMS experts formerly with Labat.)

- ◆ In addition to the HRDA "core contract" with AMEX and Creative, there are other "sub-project" activities managed by AFR/ONI. Some of these are mentioned below:
 - ◆ a Memorandum of Understanding with the Department of Commerce provides for field assistance to African exporters in complying with U.S. regulations
 - ◆ a "Management Development and Initiatives in Africa" activity;
 - ◆ grants to George Mason University for two African Communications conferences held in 1992 and 1993;
 - ◆ a Junior Achievement project (no details);
 - ◆ an Entrepreneurs Fellowship Program sending African business people to selected U.S. business schools for graduate degrees.

- ◆ It was decided that the first major order of business was to establish the process with AFR/ONI Contracting Officers by which Missions could effect "buy-ins" into our Requirements Contract. A meeting will be called the week of October 18 between AMEX, AFR/ONI staff and Contracts to work out these important details.
- ◆ It was agreed that a "team planning meeting" would be scheduled in November after all personnel are together.

Meeting between AMEX and Creative

AMEX and Creative staff assembled on Wednesday, October 13 to begin developing a schedule and priority list of tasks. Attending that meeting were: Andy, Lucy, Joyce, Jennifer, Susan and Brenda. Major points:

- ◆ a Team-building session will be organized in November soon after the arrival of the entire team;
- ◆ A 1-year workplan will be completed by mid-November;
- ◆ Proposed guidelines for buy-ins will be drafted in October following a second meeting with Paul Knepp on Oct. 19.
- ◆ In preparation for the November planning sessions, Andy will prepare a draft "proposed methodology" for PSTNAs in collaboration with Susan;
- ◆ AFR/ONI would like us to produce the first newsletter in November. Preparation is underway - gathering the previous newsletters, preparing the format, ideas, etc. Andy will draft some ideas, Dede (Creative) will put together a draft format, Susan will contribute when she returns from travel on/about Oct. 24. Newsletter material will be due by November 1 in order to finalize by mid-November.
- ◆ AFR/ONI should be notifying Missions of the new contractor by Oct. 20. We will follow up with a "marketing" fax to selected Missions where AMEX and Creative have special relationships. The fax would outline our major services. This should be followed by a more complete package with additional information, such as "how to do a 'buy-in' to the HRDA core contract."
- ◆ Jennifer has already contacted by phone all but one of the AMEX consultants on the bid; Creative will do the same.
- ◆ Susan urged that we at AMEX get on E-mail immediately. Andy and Lucy will follow up (Lucy has already ordered CompuServ). We will then be able to communicate and exchange drafts easily over the next few months while AMEX gets established in new offices.