

**PART ONE: COMPLETE EACH BLOCK FOR BOTH NEW ASSISTANCE/ACQUISITION AND MODIFICATION ACTIONS**

3. Contract/Agreement Number: 525-0275-G-SS-5053-00		PD FAR 118	
4. Contractor/Recipient Name: American Institute for Free Labor Development/Panamá		5. Organization Symbol AIFLD	
6. Project Title: Industrial Relations Service			
7. Project Officer's Name: Broehl, A.		8. Organization Symbol: PSD	
9. Requisitioning Document ID No: 525-0275-3-50073		19. Budget Plan Code: LDAA-0275-3-50073 LDAA 85-25525 EG13	
10. TYPE OF ACTION: A. New Acquisition/Assistance B. Continuation of activities set forth in a contractual document C. Revision of work scope/purpose of award		20. Country or Region of Performance: Panamá	
11. Amount of this PIO/T: U.S. \$ 200,000		21. a. This Action Increases TEC by \$ 200,000 b. Total Est. Cost of Contractual Document \$ 646,000	
12. Amount Obligated/ Subobligated/ Deobligated by this Action: U.S. \$ 200,000		22. Amount of Non-Federal Funds Pledged to the Project: U.S. \$ 0	
13. Cumulative Obligation: U.S. \$ 200,000		23. Effective Date of this Action: 7 / 29 / 85	
14. This Action Funded Through: 7 / 29 / 88		24. Estimated Completion/ Expiration Date: 7 / 29 / 88	
15. Date Contractual Documents Signed by AID Official: 7 / 29 / 85		25. Contractor DUNS Number:	
16. Incrementally Funded Contract: YES		26. Consultant Type Award: NO	
17. Host Country/ Counterpart Inst.: (Univ. Contracts) N/A		27. Number of Person Months: (PASA/RSSA only) N/A	
18. Campus Coordinator: (Univ. Contracts) N/A		28. Number of Persons: (PASA/RSSA only) N/A	
29. Negotiator's Typed Name: Michael S. Kenyon		30. Negotiator's Signature:	
32. Contract/Grant Officer's Organization Symbol: USAID/Panamá, RCO		33. Contract/Grant Officer's Signature:	
		31. Date Signed: / /	
		34. Date Signed: / /	

**PART TWO: COMPLETE EACH BLOCK FOR NEW ASSISTANCE/ACQUISITION ACTIONS ONLY**

35. SELECTION PROCEDURES: A. Formally Advertised B. Negotiated Price Competition, General Procedure C. A&E D. Ed. Inst. and/or Int'l. Research E. Collaborative Assistance F. Predominant Capability G. Unsolicited Proposal		H. Procurement to be Performed by the Contractor in Person I. Sole Source J. Impairment of Foreign Policy Objectives K. 8(a) Selection L. Grant/Cooperative Agreement M. Noncompetitive N. Small Business Set Aside O. Overseas Procuring Activities	
STAT Section NOV 6 1985 ENTERED		<input checked="" type="checkbox"/> M	

36. CONTRACT TYPE:

- A. Fixed Price (Specify: FFP, FPRD, FPEPA, FPI)  B
- B. Cost Reimbursement (Specify:  CR, CFFF, CS, CPAF, CPIF)
- C. IQC & Requirements Contracts
- D. Other Grant

45. LABOR SURPLUS AREA PREFERENCE:  D

- Labor Surplus Area
  - A. No Preference
  - B. Tie Bid Preference
  - C. Total Set Aside
- D. Not a Labor Surplus Area Preference Award

37. ADVANCE:  C

- A. No Advance
- B. Advance Non-FRLC
- C. Advance FRLC

46. Number of Bidders Offering Items or Services of Foreign Content: 0

38. SUBJECT TO STATUTORY REQUIREMENT:  E

- A. Walsh-Healey Act, Manufacturer\*
- B. Walsh-Healey Act, Regular Dealer\*
- C. Service Contract Act (U.S. ONLY - Guards, Maintenance, Laborers)
- D. Davis-Bacon Act (Construction)
- E. Not subject to Walsh-Healey; Service Contract or Davis-Bacon Act (Most AID Contracts)
- \* Equipment, Supplies, Materials, and Commodities

47. TYPE OF BUSINESS:  H

- A. Source: Non-U.S. and Used Outside U.S. & Possessions
- B. Source: Non-U.S. and Possessions (Foreign Purchases Used Inside U.S.) (If U.S. Source, complete C through Q)
- C. Firm - Profit Making & PSC's
- Non-Profit Organizations
- D. Private Educational Organizations
- E. Hospitals
- F. Research Institutions, Foundations, and Laboratories
- G. Other
- Private Voluntary Organizations
  - H. U.S. Registered
  - I. U.S. Non-Registered
  - J. Foreign
- State/Local Government
  - K. Educational Institutions
  - L. Hospitals
  - M. Research Organizations
  - N. Other
- O. International Agricultural Research Organizations
- P. Public International Organizations
- Q. U.S. Cooperatives

39. Country of Manufacture (Specify) U.S.A.

40. CURRENCY INDICATOR:  A

- A. U.S. Dollar
- B. Local Currency
- C. Combination
- D. Unfunded

41. SUBCONTRACTS: Is There a Provision for a Subcontract? (Contracts only) N/A

42. TYPE SERVICE:  B

- A. Training of Participants
- B. Technical Assistance to Host Country (Program, Project related except A&E Services)
- C. A&E Services
- D. Construction
- E. Research
- F. Technical Services to AID (other than training; usually operating expense)
- G. Training Service for AID
- H. Equipment, Materials, Supplies, Commodities
- I. Translation Service

48. Women Owned Business? NO

43. CONTRACT/AGREEMENT SOURCE:  A

- A. U.S. Contractor/Grantee
- B. Non-U.S. Contractor/Grantee
- C. Combination of A & B

49. TYPE AWARD:  H

- Small Business
  - A. Not Set Aside
  - B. Partial Set Aside
  - C. Total Set Aside
- D. Personal Service Contract
- E. Individual Non-Personal Service Contract
- F. U.S. Government
- G. University
- H. Other Non-Profit Organizations
- I. Large Businesses

44. TYPE OF AMERICAN OWNERSHIP:  G

- Minority
  - A. Asian/Pacific Islander
  - B. Black American
  - C. American Aleuts or Eskimos
  - D. American Indian
  - E. Hispanic
  - F. Other (Specify) \_\_\_\_\_
- G. Non-Minority

50. Paying Office: Payment will be made by Controller, USAID/Panama

10. TYPE OF ACTION



- A. New Acquisition/Assistance
- B. Amendment/Modification
  - 1. New/Revised Scope
  - 2. Funded Extension
  - 3. No Cost Extension
  - 4. Transfer of action from AID/W to Mission/  
Mission to AID/W
  - 5. Incremental Funding
  - 6. Overhead Rate Adjustment
  - 7. Contract Closeout
  - 8. Other
- C. Please write in FPR or FAR in the blank HB 13

51. SYNOPSIS PRIOR TO AWARD



- A. Synopsized prior to awards (see FAR 5.201)
- B. Not Synopsized Due To Emergency (see FAR 5.202(d))
- C. Not Synopsized for other reasons (see FAR 5.202  
except d)

52. COMPETITIVE SOLICITATION PROCEDURES



- A. Normal full & open competition
- B. Architect - Engineer
- C. Basic Research Proposal
- D. Multiple Award Schedule
- E. Alternate Source - Reduced Cost
- F. Alternate Source - Mobilization
- G. Alternate Source - Engineering/R&D  
Capability
- H. Small Business Set-Aside
- J. Labor Surplus Area Set-Aside
- K. LSA/Small Business Set-Aside
- L. Other than full & open competition
- M. Small purchases
- N. B(A) program
- P. Otherwise authorized by Statute

53. AUTHORITY FOR OTHER THAN FULL  
& OPEN COMPETITION



- A. Unique Source
- B. Follow-on Contract
- C. Unsolicited Research Proposal
- D. Patent/Data Rights
- E. Utilities
- F. Standardization
- G. Only One Source - Other
- H. Urgency
- J. Mobilization
- K. Essential R&D Capability
- L. International Agreement
- M. Authorized by Statute
- N. Authorized Resale
- P. National Security
- Q. Public Interest

54. METHOD OF SOLICITATION



- A. Sealed Bid
- B. Competitive Proposal
- C. Combination/Competition
- D. Other Competition
- E. Noncompetitive

55. NUMBER OF OFFERORS



- A. Only one offeror.
- B. More than one offeror.

56. APPLICABILITY OF COMPETITION IN CONTRACT ACT (CICA)



- A. PRE-CICA
- B. POST-CICA



AGENCIA DE LOS ESTADOS UNIDOS PARA EL  
DESARROLLO INTERNACIONAL

USAID Panamá

APARTADO 6959  
PANAMA 5, PANAMA  
TEL. 63-6011

29 JUL 1985

American Institute for Free Labor  
Development/Panamá  
Apartado Postal 8729  
Panamá 5, Panamá

Subject: Grant No. 525-0275-G-SS-5053-00

Gentlemen:

Pursuant to the authority contained in the Foreign Assistance Act of 1963, as amended, the Agency for International Development (hereinafter referred to as "AID" or "Grantor") hereby grants to the American Institute for Free Labor Development (hereinafter referred to as "AIFLD" or "Grantee") the sum of two hundred thousand United States dollars to provide support for the training program in labor organization and management as more fully described in Attachment 1 to this Grant entitled "Program Description."

This Grant is effective and obligation is made as of the date of this letter and shall apply to commitments made by the Grantee in furtherance of program objectives during the period August 1985 through July 1986.

Contingent upon availability of funds, the Grant's conformance with USAID/Panamá's overall strategy and USAID/Panamá's satisfaction with Grantee performance, AID intends to provide funding of six hundred and forty-six thousand United States dollars (\$646,000) to cover a period from August 1985 to July 1988.

This Grant is made to AIFLD, on condition that the funds will be administered in accordance with the terms and conditions as set forth in Attachment 1 entitled "Program Description" and Attachment 2 entitled "Standard Provisions," which have been agreed to by your organization.

Please sign the original and five (5) copies of this letter to acknowledge your acceptance of the conditions under which these funds have been granted. Please return the original and four (4) copies of this Grant to the USAID/Regional Contract Office.

Sincerely,

M. Kenyon  
Grant Officer

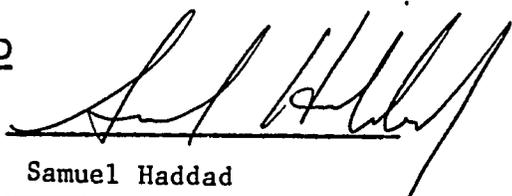
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**Attachments:**

1. Program Description
2. Standard Provisions

ACCEPTED

BY :



NAME : Samuel Haddad

TITLE: Deputy Executive Director

DATE: August 6, 1985

Fiscal Data:

Appropriation : 72-1151021.5  
Allotment : LDAA-85-25525-EG13  
PIO/T : 525-0275-3-50073  
Project No. : 525-0275  
Total Grant Amount: \$200,000

## ATTACHMENT 1 - PROGRAM DESCRIPTION

### A. BACKGROUND

USAID/Panamá has developed a Private Sector Strategy and Program to assist and support a common strategy with the Government of Panamá (GOP) and appropriate elements of the private sector to: (1) facilitate successfully the transition of Panamanian producers and suppliers from total reliance on domestic and Central American markets to greater participation in world markets, and (2) assure wide dissemination of the direct and indirect benefits of such participation. The strategy calls for attainment of five essential conditions:

1. A substantial increase in the competitive position of firms operating in Panamá.
2. Regular flow of market information to potential Panamanian suppliers/producers.
3. Ready access to adequate development finances.
4. Re-orientation of management, vocational and technical training to meet current and future production requirements.
5. GOP support of appropriate private sector initiatives through appropriate changes in administration of regulatory service and promotion activities.

The business and industrial communities are developing the capacity to analyze broader issues of economic policy and to enter into public dialogues with greater awareness of issues which transcend their immediate preoccupations. This Grant will begin to provide the labor movement with the same capability of understanding the economic ambience in which it functions, of recognizing implications of its short-term positions viz-a-viz the long-term interests of its members, and of engaging in constructive public dialogue with business and government. The Grant contributes to the USAID strategy of encouraging and facilitating policy dialogue and of broadening sectoral participation in such.

A second objective of this Grant is to assist the Confederación de Trabajadores de la República de Panamá (CTRP) in the development of attitudes, knowledge and skills in collective bargaining so that industrial relations can be conducted on the basis of economic interests; thus reducing the need for government intervention. Collective bargaining in Panamá during the last decade has been characterized by government arbitration rather than freely negotiated contracting between employers and trade unions. This Grant will assist by encouraging greater reliance on the private sector and less on the Ministry of Labor.

B. STATEMENT OF WORK

1. Grant Purpose and End-of-Grant Status

The purpose of this Grant to AIFLD is to enable the CTRP and its member unions to:

- a. Play an increased role in national economic, social and political affairs.
- b. Negotiate with business associations and private firms in a more direct fashion and with less and less government intervention.

To attain this purpose, the Grant will assist the CTRP, through AIFLD, to:

- a. Carry Out a Study of National Economic and Employment Problems from the Workers' Point of View. This will assist in defining the role of unions within this national context, what priorities workers and unions have and what problems they feel should be tackled so as to build a stronger Panamá.
- b. Establishment/Strengthening of an Industrial Relations Service Department whose main purpose will be to give appropriate technical and legal assistance to CTRP affiliates so that these become increasingly capable of resolving grievances and negotiating collective bargaining agreements.

At the end of the Grant, the following conditions will have been attained:

- a. CTRP leadership will be more aware of the complex economic and employment related problems which face Panamá.
- b. CTRP will be able to present its position with respect to these problems to the GOP in a more coherent manner.
- c. CTRP will have completed a study of national economic and employment issues as well as the problems confronting labor unions in the industrial relations system of Panamá.
- d. CTRP will have created a Department of Industrial Relations for providing technical assistance to its affiliates for collective bargaining.
- e. Regional leaders will take a more active part in helping to resolve the problems of their areas.

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- f. 120 local unions and bargaining units will have proficient negotiating teams able to use technical assistance and demonstrating greater ability to deal with cost factors of a contract.
- g. CTRP will have less dependence on Ministry of Labor intervention in contract negotiations and the grievance process.
- h. CTRP's education programs will have significantly improved the quality of union leadership.

2. Grant Program

a. Increased Role for CTRP in National Economic, Social and Political Affairs

An increased role of the CTRP in national affairs will depend on its ability to formulate a position on issues influencing the economy and the generation of employment. The Grant will provide resources to carry out a national survey, widely disseminate its results and prepare union leaders to take their message to places where national policies are formulated. This survey will be designed by the Industrial Relations Service Department with the assistance of an industrial relations expert recommended by the AFL-CIO and will focus on national economic, social and political issues of importance to labor. Survey information will be supplemented by existing data from other sources on the economy, employment and income. The completed study will include:

- (1) An analysis of major economic and employment related problems which affect Panamanian workers and their families drawn from existing studies and other data sources.
- (2) An examination of labor/management relations in different regions of Panama and different industrial sectors.
- (3) An examination of those management units and employer associations willing to participate in the survey.
- (4) The preparation of a final report for wide dissemination both inside trade union circles and to employers, government and the public at large.
- (5) The development of conferences and seminars to discuss survey results.

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It is the Industrial Relations Service Department of the CTRP, with outside assistance provided through AIFLD, which will carry-out the above survey components. Field survey information will be obtained from interviews with trade union leaders and members, management representatives and government officials. The tabulation of the results of the survey and their analysis will also be performed by the Industrial Relations Service Department. This analysis will be compared with data from other studies already at hand. It is expected that a review of these other studies will give labor some important information and insights for incorporation into the conclusions.

A completed study will be prepared with important data and useful conclusions on the most important problems facing democratic trade unions and conclusions on how to best confront these situations. This will include a detailed and specific analysis of the national economic, social and political situation of Panamá as seen by the CTRP. Upon termination of the study, various conferences will take place to discuss the results and implications of these results for CTRP. The final report, as adopted by the CTRP Executive Board, will be printed and distributed to union leaders and others. It is expected that many problems and conclusions from the report will become subjects of discussion with employers in meetings between CTRP and the business associations and also at the local union/individual firm's management level.

The final report will be widely disseminated within CTRP as well as to management and government organizations. Conferences will be set up to discuss the final conclusions and to explain the trade union's position on various national issues.

b. Increased CTRP Negotiations Directly with Business Associations and Private Firms with Less and Less Government Intervention

AIFLD will improve the CTRP and their affiliates' ability to negotiate directly with employers and employer associations by (1) improving the technical assistance available from CTRP to member unions, and (2) increasing the educational activities for improving the bargaining skills of union leaders.

(1) Improving Technical Assistance Available from the CTRP

An Industrial Relations Service Department will be established in the CTRP to give appropriate technical and legal assistance to CTRP affiliates so that these become increasingly capable of resolving grievances and negotiating collective bargaining agreements directly with management

which in turn will lessen the role of the Ministry of Labor in these activities. This assistance will help these affiliates to overcome the problems caused by inexact contract cost estimates during negotiations; by imprecise language; by neglecting important areas of concern such as grievance procedure, safety and health, skills training, etc.

The Industrial Relations Service Department will have a three-person staff assisted by one legal and one economic consultant.

--Director

A trade unionist with extensive experience in collective bargaining and problem solving will be the Director, giving the department the direction it needs and to ensure the prominence of trade union priorities. He/she will be responsible for overseeing all department activities and for keeping the CTRP's General Secretary and Executive Board informed. He/she will assist CTRP's Education Coordinator in all related educational activities, and will work closely with U.S. consultants. The Industrial Relations Service Department Director will report directly to the CTRP's Secretary General.

--Legal Consultant

The Legal Consultant will be responsible for reviewing all collective bargaining contracts referred to CTRP by local unions. He/she will make recommendations on sharpening language, eliminating loopholes, and in general reducing ambiguity in collective bargaining contract clauses for the purpose of cutting down on the length of negotiations. In addition, the Legal Consultant will review and interpret legislation affecting organized labor, including the labor code. Finally, he/she will assist in the education program when requested.

--Economic Consultant

The Economic Consultant will be responsible for advising the CTRP leadership on all economic issues, both at the national level and within given economic sectors. He/she will review all collective bargaining contracts referred to the CTRP for assistance with emphasis on evaluating the true cost of union demands, both for wage increases and improvements in working conditions. The Economic Consultant will compile and interpret available financial information relevant to contracts being negotiated. He/she will assess the economic impact of labor sector-related legislation and will assist when requested in education programs.

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--Two Promoters

The Promoters will be responsible for promoting the technical services of CTRP's Industrial Relations Service Department among the affiliated unions and for bringing individual cases (e.g., bargaining contracts, grievances) to the attention of the Department Director. They will gather vital statistics and other data required for the purposes of monitoring and evaluating Project activities. They will encourage payment of dues to CTRP from affiliated federations. Finally, the Promoters will assist when requested with education and training activities.

To get the program started, the Industrial Relations Service Department will hold organizational meetings at each of the federations at which lists will be drawn up of all pending contracts, together with an assessment of technical assistance requirements for each. An inventory of the existing technical expertise within the union -- contracted or otherwise -- will be compiled. This information will then be analyzed by the Industrial Relations Service Department and a plan worked out for programming all available resources among the priority areas. A system for reporting and evaluating the results of the technical assistance offered -- i.e., the success or failure of the negotiations, the extent to which the recommendations were followed -- will be established. The information will be analyzed by the Department, and the conclusions and recommendations derived therein will be incorporated into an amended work plan for the next reporting period. Included in this analysis will be recommendations for any additional education or training required. Contacts will be pursued with business sector groups and management where deemed to be fruitful.

An inventory will be established of all affiliated unions with Secretaries of Defense, those union officials designated to deal with grievances. The Promoters will assess their level of expertise in resolving grievance problems so that assistance and training can be provided to those requiring it. Where Secretaries of Defense do not exist, the Promoters will encourage local unions to select them.

Through the above described organizational meetings and inventory, the Industrial Relations Service Department will develop working relationships with the many CTRP important affiliates in the Metropolitan Corridor as well as in Chiriquí, Bocas del Toro and the Central Provinces.

Technical assistance will be provided the CTRP for the establishment of the Industrial Relations Services Department and for training its staff.

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(2) Education Program for CTRP Leaders and Members

The CTRP has an Education Department. The Education Coordinator will work with the Industrial Relations Service Department on designing and programming the collective bargaining seminars for local union negotiating teams preparing for new contract talks, conferences on the results of the Industrial Relations study and other issues of national importance. The Education Coordinator will also program training for intermediate and top leaders in areas determined to be of most importance for the democratic trade union movement.

AIFLD will lend its economic consultant to these programs. An Industrial Relations Education Expert will assist in setting up the collective bargaining and other seminars, and in reviewing these at regular intervals.

To increase participation, vary the course format and to give a more realistic atmosphere to the courses, the following educational aids and equipment will be used: (a) case studies for use in mock sessions in contract negotiations based on the Panamanian labor relations scene; (b) video tape equipment, to allow participants to study their participation in mock sessions; (c) films, translations and manuals on important subjects; (d) an overhead and slide projector for better projection of course material, and (e) the development of required slide programs.

The Grant will finance scholarships to AIFLD courses at the George Meany Labor Studies Center in courses related to collective bargaining and the democratic trade union role in national affairs; two scholarships per year to the high level program for labor leaders at Harvard University; three scholarships per year to the Department of Labor Seminar on the use of economic data in collective bargaining; as well as other related subjects.

3. Program Administration

The Grant will permit the above program to be administered by AIFLD for the CTRP. AIFLD will be responsible for assembling all financial reports, supporting documentation, and narrative progress reports received from the CTRP. As a part of the program, CTRP will agree to an in-depth audit without prior notification at any time during the life of the Grant.

The disbursement procedure between AIFLD and the CTRP will begin on a monthly basis, with receipts and other supporting documents being submitted against advances, which will be based on a monthly budget submission. Any

outstanding unspent balances will be returned to AIFLD at the end of each month. Beginning with Year Two, if CTRP has proven itself capable of handling this system, 60- to 90-day advances may be extended, with receipts submitted at the discretion of the CTRP, or at an agreed upon "trigger" balance of, for example, 30 days of operating funds.

For auditing and control purposes, CTRP will be required to open a separate account entitled "Program OPG", into which all AIFLD-supplied Grant funds will be deposited. As part of the financial reporting to AIFLD, the CTRP will include copies of the bank reconciliation of these accounts. At the termination of the Grant, any outstanding balance in this account will be returned to by AIFLD to AID. The CTRP will arrange, with Grant funds, for annual audits by an outside firm during the Grant period to audit the Program OPG account.

The Secretary General of the CTRP will require monthly reports from the three Department Heads (Industrial Relations Services, Education, Administration/Accounting) describing progress made, problems encountered, and plans for future activities. CTRP and AIFLD will design the format for these reports and AIFLD will receive copies. The CTRP accountant will prepare monthly financial reports, including income and expense statements and a quarterly balance sheet.

AIFLD will report to USAID on a quarterly basis. These reports will include a financial accounting of the funds disbursed, an indication that funds were disbursed to meet program goals, as well as a narrative describing progress made towards the program objectives, problems encountered, future plans and other observations.

In addition to these written reports, the AIFLD Director in Panamá will maintain daily contact with the CTRP Secretary General to monitor the status of the program and handle any other problems as they arise.

AIFLD will arrange for the purchase of a vehicle. Remaining commodities will be purchased locally by the CTRP.

#### 4. Grant Program Inputs, Outputs and Benchmarks

AIFLD will be responsible for the following yearly outputs (benchmarks) to assure USAID that the program will meet its final outputs and objectives. Quarterly reports should indicate how annual targets are being met.

Year 1

- a. National survey completed and results widely disseminated.
- b. Industrial Relations Service Department is functioning and Education Coordinator is on board.
- c. 50 collective bargaining agreements have been negotiated without GOP intervention.
- d. 21 CTRP members have been sent to the U.S. for training.
- e. 40 CTRP members have participated in Collective Bargaining Seminars.
- f. 75 CTRP leaders have participated in Top Leadership Seminars.
- g. 140 CTRP members have participated in week-end conferences.
- h. 2 meetings of the CTRP Industrial Relations Board have taken place.

Year 2

- a. CTRP has participated in national level policy activities together with employers and the GOP.
- b. Industrial Relations Service Department has provided direct assistance to at least 20 CTRP affiliates to improve their local collective bargaining/grievance capabilities.
- c. 75 collective bargaining agreements have been negotiated without GOP intervention.
- d. 21 CTRP members have been sent to the U.S. for training.
- e. 40 CTRP members have participated in Collective Bargaining Seminars.
- f. 75 CTRP leaders have participated in Top Leadership Seminars.
- g. 140 CTRP members have participated in week-end conferences.
- h. 2 meetings of the CTRP Industrial Relations Board have taken place.

Year 3

- a. CTRP has demonstrated success in contributing to solving national economic, social and political problems.

- b. Industrial Relations Service Department has provided direct assistance to at least 40 CTRP affiliates to improve their local collective bargaining/grievance capabilities.
- c. 100 collective bargaining agreements have been negotiated without GOP intervention.
- d. 21 CTRP members have been sent to the U.S. for training.
- e. 40 CTRP members have participated in Collective Bargaining Seminars.
- f. 75 CTRP leaders have participated in Top Leadership Seminars.
- g. 140 CTRP members have participated in week-end conferences.
- h. 2 meetings of the CTRP Industrial Relations Board have taken place.

#### 4. Evaluation

##### A. Measurement and Evaluation of Project Accomplishment

Two evaluations shall be made : a mid-project reassessment of objectives and goals after the first year of operations, and a final evaluation after 10 reporting periods to allow time for any final adjustments in the program before termination of funding. It is recommended that the CTRP as soon as possible after project approval begin compiling baseline statistics one: 1) its membership and income, family size, and other demographics; 2) the collective bargaining process; 3) occupational safety and health situation, and 4) the general state of labor/management relations.

In the evaluation by CTRP, AIFLD and the independent evaluator, a series of specific questions must be asked of the project. However, it should be noted that these are not the only questions which will have to be considered.

##### B. Questions for the Evaluation Process of Objective 1: Play an Increased Role in National Economic, Social and Political Affairs

Has the CTRP and its leadership become more aware of the issue involved in economic, social and political development? Has this been reflected in CTRP policy and positions taken by CTRP and its relations with the National Assembly, the government, commissions and others? Does the CTRP speak in more detail when it presents policy positions?

How effectively have regional CTRP leaders become in the affairs of their areas? How does this compare to past experience?

How much input is the top CTRP leadership getting from the intermediate leadership who have taken courses?

What results came from the Industrial Relations study? How were these useful in formulating trade union policies? How were they disseminated?

How do outside forces see the CTRP and its effects in national affairs upon completion of the OPG?

C. Questions for the Evaluation Process of Objective 2: Negotiate with Business Associations and Private Firms in a More Direct Fashion and with Less and Less Government Intervention

The Industrial Relations Department: How well did it do in:

Providing technical assistance to unions which are negotiating collective bargaining agreements when the results of its efforts are compared with a baseline study of the situation during the first months of Year 1? Said analysis will have to be prepared by this Department.

How did it use the results of the Industrial Relations survey?

Was there greater reliance on direct union/management negotiations? Did the recourse to the Ministry of Labor on contract implementation disputes decline?

Was the Department and INEL able to work with approximately 120 unions who had negotiations coming up in years 1, 2 and 3?

Based on information given by these unions during the pre-negotiations preparations and feed-back once a contract was signed, how did the contracts improve in the economic clauses, the language used, the emphasis on grievance procedure and an effective occupational safety and health program, skills training and joint union/management action on productivity, etc.? What examples of contract improvement were most notable? How many workers benefited? How has management reacted?

What was the situation in selected unions concerning grievance procedure at the start of the OPG? What changes occurred? Did these examples affect other unions and management?

What did the participants to U.S. scholarships do upon their return to Panamá? Did it meet the criteria set up for them before their departure?

How effectively used were the audio-visual aids? How receptive were leaders and participants in the education program to the case studies, manuals and slide shows?

Has the CTRP established a wider range of contacts with professionals and experts with whom it can consult on an as needed basis than was the case at the beginning of Year 1?

D. These evaluations shall be funded from sources outside the Grant and conducted under the supervision of the Grantor.

C. TRAINING PLAN

1. YEAR I

A. U.S. Training

1. 14 scholarships at the George Meany Center (10 paid for by AIFLD, 4 paid for by USAID). The training programs are 6 weeks in duration. The CTRP will contribute the labor costs paid by firms during the training.

2. 2 scholarships at the Harvard University Trade Union Seminars paid for by USAID. The seminars are 4 months duration. The CTRP will contribute the labor costs paid by firms during the training.

3. 3 scholarships at the U.S. Department of Labor paid for by USAID. The seminars are an average of 4 weeks. The CTRP will contribute the labor costs paid by firms during the training.

B. Local Training

1. 4 weekend conferences on national issues, to include 40 participants for 2 days. CTRP contribution will be one half day's labor cost per participant.

2. YEAR II

A. U.S. Training

1. 14 scholarships at the George Meany Center.

2. 2 scholarships at Harvard University Trade Union Seminars

3. 3 scholarships at the U.S. Department of Labor.

CTRP contribution will be the same as Year I.

B. Local Training

1. 4 weekend conferences on national issues.

2. 6 two-week seminars for top and upper middle level leadership.

3. 16 two-week seminars on Collective Bargaining.

4. 2 two-day meetings of the CTRP Industrial Relations Advisory Board.

CTRP contribution will be the same as Year I.

3. YEAR III

A. U.S. Training

1. 14 scholarships at the George Meany Center.
2. 2 scholarships at Harvard University Trade Union Seminars.
3. 3 scholarships at the U.S. Department of Labor.

CTRP contribution will be the same as Year I.

B. Local Training

1. 4 weekend conferences on national issues. CTRP contribution will be the same as Year I.

2. 4 two-week seminars for top and upper middle level leadership paid for by USAID to include 12 participants each; instructors; lodging for three participants; training materials; transportation. CTRP contribution will be 11 days' labor costs/participant.

3. 16 two-week seminars on Collective Bargaining. CTRP contribution will be the same as Year I.

4. 2 two-day meetings of the CTRP Industrial Relations Advisory Board. CTRP contribution will be the same as Year I.

D. BUDGET

1. The following budget is illustrative in nature. The Grantee may adjust individual cost lines as necessary to achieve the Grant program. However, the Grantee shall not exceed the total Grant obligation stated in paragraph 2 below without prior written permission from the Grant Officer.

BUDGET

Salary	\$112,150
Consultants	119,200
Travel and Transportation	22,550
Allowance	6,400
Participant Training	164,400
Subcontracts	800
Other Direct Costs	191,400
Equipment and Supplies	<u>29,100</u>
TOTAL GRANT	\$646,000

2. The total amount currently obligated is \$200,000.

E. DELETIONS FROM ATTACHMENT 2. STANDARD PROVISIONS

- 5A Negotiated Overhead Rates - Predetermined
- 5B Negotiated Overhead Rates - Nonprofit Organizations Other than Educational Institutions
- 7B Payment - Periodic Advances
- 7C Payment - Cost Reimbursement
- 13A Title to and Use of Property (Grantee Title)
- 13B Title to and Care of Property (US Government Title)