

**THE TECHNICAL
ASSESSMENT
OF THE
TRAINING BLOCK GRANT
(TBG)**

Submitted to:

**United States Agency for International Development/Cairo
Office of Local Administration and Development**

Submitted by:

**EDC
Education Development Center, Inc.**

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**Indefinite Quantity Contract Number
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نتائج تقييم تنفيذ المرحلة الاولى من برنامج المنحة الاجمالية

للتدريب والتوصيات الختمة بالمرحلة الثانية

نوضح فيما يلي اهم النتائج التى توصل اليها فريق التقييم الفنى لانجازات برنامج المنحة الاجمالية للتدريب، والتوصيات التى يقدمها بغرض الوصول الى تحقيق اهداف البرنامج بالفاعلية المطلوبة.

وبصفة عامة، يمكن القول بان برنامج المنحة الاجمالية للتدريب كان مشمرا، وانه ينبغي ان تستمر الوكالة الامريكية للتنمية الدولية فى تمويله، فهو جهد رائد يستحق الدعم حتى يحقق اثره المنشود فى مجال التنمية المحلية بصفة عامة، وفى دعم مبدأ الادارة المحلية (اللامركزية) وتقوية القدرات فى مجال ادارة وتنفيذ التدريب وادخالها فى هيكل الادارة المحلية.

اولا: نتائج دراسة نظام ادارة التدريب

١ - تم تصميم هذا النظام على اساس نظام الادارة باللجان، وذلك نظرا لان الهياكل التنظيمية للمحافظات لم تكن، ومازالت، تتضمن ادارة مسئولة عن التدريب السلارم لمشروعات التنمية المحلية بصفة عامة ومشروع التنمية المحلية رقم (٢) بصفة خاصة.

٢ - بالسند للجنة الفرعية للتدريب التابعة للامانة العامة، بدأ دورها قويا حيث قامت بتدعيم برنامج المنحة الاجمالية الى المسؤولين بالمحافظات، والتوجهات الواردة فى اعفاء المنحة والتعليمات المنظمة لتنفيذ البرنامج كما انها بمساعدة استشارى المساند، الفنية قامت بمراجعة خطط التدريب التى اعدتها المحافظات، وقدمتها للجهات المسند لاعتمادها، ولكنها لم توفر القيادة الفعالة فى مجال تنفيذ هذه الخطط ومساعد تحقيق اهداف برنامج المنحة الاجمالية والالتزام بالتعليمات الواردة بخطاب سند المشروع رقم ١٤.

٣ - ساند. نعان للتدريب بالمحافظات، فانه رغم ما قد لوحظ من اختلافات فى تشكيل هذه الساند. بالمحافظات التى تمت دراستها بوصفها عينة ممثلة - فان عضوية هذه اللجان قد

كفلت تمثيل الجهات المعنية بالتدريب اللازم لمشروعات التنمية المحلية. كما ان رئاسة
سكرتير عام المحافظة لهذه اللجان قد كفلت الارتباط الفعال مع المحافظ ومع لجنة
التنمية المحلية، والمديريات التابعة للمحافظة، وادارات الحيوان العام.

٤ - بالنسبة لإدارة التدريب بالمحافظات، تبين انه لا توجد بهيكل المحافظة ادارة للتدريب،
وما يجرى عليه العمل هو اسناد اختصاصات ووظائف التدريب الى مجموعة عمل مكونة من
فردين او اكثر في مديرية التنظيم والادارة أو الادارة العامة للتخطيط أو الادارة العامة
لتنمية وبناء القرية. ولئن هذه في نفس الوقت، ابدي السادة المحافظون بمحافظة قنا،
الغربية، الشرقية، والقليوبية اهتمامهم بالتدريب ورغبتهم الاكيدة في انشاء ادارات
متخصصة بالتدريب تكون تحت اشرافهم المباشر.

وفي مجال نظام ادارة التدريب الخاص بالمنحة الاجمالية، يوصى الفريق بما يلي:-

(أ) بمناسبة انشاء وزارة للادارة المحلية، يرى الفريق ان تظل اللجنة الفرعية للتدريب
قائمة بنفس تشكيلها الى جانب ما ارتآه السيد/ سكرتير عام الوزارة من انشاء قطاع
للتدريب برئاسة وكيل أول للوزارة وعلى اللجنة ان تقوم بدور أقوى في قيادة التدريب
بالمحافظات عن طريق عقد اجتماعاتها بصفة منتظمة وانظار المحافظات بما قد تراء من
ملاحظات أو اقتراحات على خطط التدريب وعلى اوضاع تنفيذ هذه الخطط بما يكفل
الالتزام باتفاقية المنحة وارشادات وتعليمات وكالة التنمية الأمريكية ومولا الى تحقيق
اهداف برنامج المنحة الاجمالية الخاصة باللامركزية الادارية وتقوية القدرات المحلية
للتدريب.

وفي نفس الوقت، ينبغي عليها الا تمارس سلطة مركزية على لجان التدريب بالمحافظات
على النحو الذي يتعارض مع مفهوم اللامركزية، ومع الهدف الخاص بتقوية القدرات
المحلية للتدريب بالمحافظات.

(ب) كما يرى الفريق الابقاء على لجنة التدريب بالمحافظة مع تزويدها بالملاحيات الكاملة
للاشراف العام ووضع السياسات المحلية التي تحكم تخطيط التدريب وتحديد

المجموعات التي يتم تدريبها، واختيار انسب برامج التدريب والمدربين و / أو جهات التدريب المحلية والاقليمية والمركزية ومتابعة تنفيذ الخطط وتحقيق اهداف برنامج المنحة الاجمالية واعادة التنفيذ الى الخط السليم (اذا ما حدثت انحرافات).

(ج) انشاء ادارة متخصصة ومسئولة عن التدريب بكل محافظة، يمثل نظام المنحة الاجمالية للتدريب احد انشطتها الرئيسية ومكملا لانشطة التدريب الاخرى اللازمة لتنمية القوى البشرية .
وتقوم هذه الادارة بالاعمال اليومية الخاصة بالتدريب، واعداد تقارير متابعة التدريب على نظام تقارير الاستثناء وعرضها على لجنة التدريب، وتنفيذ توجيهاتها.

(د) عقد ندوات تدريبية متقدمة يحضرها اعضاء اللجان وموظفي التدريب، والمسؤولين بالادرات المستفيدة من التدريب بالمحافظات، لتبادل الخبرات والدروس المستفادة من المرحلة الاولى لبرنامج المنحة .

ثانيا : نتائج دراسة أداء وظائف برنامج المنحة الاجمالية للتدريب

(١) تخطيط التدريب

تم اعداد خطط التدريب بما يتفق الى حد كبير وارشادات البرنامج الموضوعه بمعرفة وكالة التنمية الامريكية وبمساعدة استشارى المعونة الفنية .
ولكن تحديد احتياجات التدريب، وتقييمها لم يتم بشكل منظم أو بناء على تحليل بيانات وصف الوظائف أو متطلبات أعمال التنمية المحلية، ومعدل شغل الوظائف اللازمة لهند الأعمال .
كما ان خطة التدريب لم تكن جزءا من خطة طويلة الاجل لتنمية القوى العاملة بالمحافظة . أو مكملة لها .

وفي هذا المجال يوصى الفريق :-

(١) بان تقوم المحافظات بوضع خطة طويلة الاجل لتنمية القوى العاملة بمشروعات التنمية المحلية، وان يمثل برنامج المنحة الاجمالية جزءا اساسية في هذه الخطة .

(ب) ان يتم تدريب المسؤولين بالقرى والمدن والمراكز على الاساليب العلمية لتحديد الاحتياجات التدريبية.

(ج) وان يتم اعداد وامدار دليل اجراءات تخطيط القوى البشرية بالمحافظات والالتزام بما ورد به عند اعداد الخطط المبنية على تقدير سليم للاحتياجات التدريبية.

(2) اعداد وتصميم برامج التدريب

بصفة عامة، لم يكن تصميم برامج التدريب مناسباً بالدرجة المطلوبة ولعل ذلك يرجع الى

لم يتم تحديد منهج معين لتصميم مناهج التدريب الخاصة بمشروعات التنمية المحلية وتم الاعتماد على برامج تكرارية موضوعة بمعرفة الجهاز المركزى للتنظيم والادارة فى مجال التدريب الادارى والاستعانة باساتذة من الجامعات فى مجال التدريب على قانسون الادارة المحلية.

وبالنسبة للتدريب الفنى، تم الاستفادة بما كانت تقدمه شركة كيمونكس / ولبر سميث لتدريب العاملين فى مشروعات التنمية، كما تمت الاستفادة من برامج الهيئة القومية لمياد الشرب والمرف المص والمعاهد الفنية، ولكن المعول عليه كان التدريب فى موقع العمل بمقتضى برامج موضوعة بمعرفة المهندسين المشرفين على العمل مستقاة من خبرتهم العملى، والكتالوجات الخاصة بالمعدات والاجهزة.

وبالنسبة لتدريب اعضاء الجمعيات الاهلية التى تتلقى المعونة من الوكالة الامريكية، فاد تمت الاستفادة من خبرة مديرى الشؤون الاجتماعية والمشرفين على مشاغل البنات والنساء وجمعيات الاسعاف الاهلية.

ويومى العربى فى هذا المجال بما يلى :

(أ) - تم اعداد لجنة التدريب بالمحافظة، ومديرى ادارات التدريب بالمحافظة والمديريات
المدرسين الذين تمت الاستعانة بهم فى التدريب بالمرحلة الاولى، والجمعيات
التي تم اعدادها من اوسس تصميم مناهج التدريب ومتطلبات تنفيذها.

(ب) تكليف المدربين الذين يتم تدريبهم بتمميم برامج التدريب الخاصة بهم ومتابعة تغطية هذه البرامج لكافة الاحتياجات التدريبية لمشروعات التنمية المحلية.

(٣) تنفيذ برامج التدريب

تم تنفيذ برامج التدريب في مواقع محلية (قاعات، فصول، ورش اخصائية ومشاغل ومدارس حضانة وجمعيات اسعاف).

كما تمت الاستعانة بمعاهد فنية اقليمية واساتذة الجامعات واكاديمية السادات.

وفى ما يتعلق بالاشراف على الدورات التدريبية فقد كان يكفى بالكاد لتحقيق الفاعلية المطلوبة.

اما اساليب التدريب فقد كانت تقليدية وتحتاج الى التطعيم بمداخل اخرى مبتكرة ومتعددة.

وبصفة عامة يمكن القول انه قد تم تنفيذ برامج التدريب بصورة مرضية.

وبالاضافة الى التوصيات السابقة الخاصة بتخطيط التدريب وتصميم مناهج التدريب، يوصى الفريق في هذا المجال باعداد ادلة اجراءات لتنفيذ وتقييم العملية التدريبية بصورة متكاملة وذلك بواسطة المدربين اثناء حضورهم البرنامج التدريبي الموصى به.

ثالثا: انجازات التدريب

اذا ما أخذنا في اعتبارنا الفترة الزمنية القصيرة نسبيا التي تم فيها تنفيذ برامج المنحة الاجمالية، فانه يمكن القول ان كما كبيرا من الدورات التدريبية قد تحقق بمحافظات العينة المضارة في الانواع الثلاثة للتدريب (الادارى - الفنى - الاجتماعى) كما تم تدريب عددا كبيرا من المتدربين في كل نوع.

ورغم ما ابداه المتدربون الذين تم مقابلتهم اثناء الزيارات الميدانية من استفادتهم مما حصلوا عليه من تدريب، الا انه في ظل ما سبق عرضه من اوصاف تصميم مناهج التدريب ونوعية المدربين ومواقع التدريب واسلوب الاشراف ، يتعين القول بان جودة التدريب قد تأثرت الى حد كبير بهذه المحددات ، وهو الامر الذي تناولته التوصيات السابقة.

رابعاً: تمويل التدريب

يسجل الفريق قدرة المحافظات على تلقي وانفاق الاموال التي تخصص للتدريب. فمن خلال المنحة الاجمالية، انفقت محافظات العينة عشرة اضعاف ما نعدت انفاقه على التدريب قبل المنحة.

كما تتميز تكلفة التدريب بالانخفاض النسبي حيث بلغت ٨ جنيهات للفرد في اليوم، مقارنة على سبيل المثال ستكلفة التدريب الفتي مشروع التدريب للتنمية المحلية رقم (٢) التي فاقت ذلك بكثير.

وبمقدار عامة، فان ٥٠٪ من تكلفة التدريب تم صرفها على المتدربين بينما ذهب ٢٥٪ منها للمدربين و١٥٪ للمصروفات الاخرى.

خامساً: نظام الرقابة والمتابعة

نصف النماذج الموضوعة لمتابعة ورقابة أنشطة التدريب، بصفة عامة، بالبدائية من حيث المصمم والمحتوى. ويظهر ذلك جلياً في الصياغة وتتابع الاجزاء، ولذا كانت معظم ساسها غير مستوفاه عند استخدامها.

مسعد المتدربين بعد حضورهم التدريب وعودتهم الى اعمالهم غير منتظمة ان لم تكن مسعد للمرة، ولذلك يتعذر الانعريف على اثر التدريب على اداء العاملين.

ويومى الفريق فى هذا المجال :

الاهتمام بتطوير نماذج الرقابة لجمع المعلومات الكافية والدقيقة لتوضيح مدى استفادة المتدرب من التدريب فى اداء العمل . كما يجب ان يتم متابعة المتدربين باسلوب منظم ومنتظم، علاوة على ضرورة النظر فى اعادة تثبيت الخبرات المكتسبة للمتدربين عن طريق تنظيم لقاءات دورية لتبادل الخبرات بعد مرور فترة من التدريب.

سلما: نظام معلومات الادارة

تسين للفريق انه لا يوجد نظام الى لمعلومات ادارة التدريب فى المحافظات أو وزارة الادارة المطية ولكن يوجد اهتمام زائد من المحافظات بتصميم واقامة هذا النظام خاصة وانه يوجد بها حاليا اجهزة كمبيوتر شخصية، وافراد تم تدريبهم على تشغيلها واعداد البرامج الخاصة باعمال اخرى . وبالنسبة لديوان عام وزارة الادارة المطية، يوجد نفس الاهتمام، ولكن ابدى ان الاوضاع القائمة تدعوى الى تأجيل اولوية نظام معلومات التدريب لفترة بسيطة .

ويومى الفريق:

بتكليف استشارى المساعدة الفنية باعداد دراسة جدوى انشاء نظام الى لمعلومات التدريب يربط بين ادارات ديوان عام المحافظة، والمديريات التابعة من ناحية، وبين ديوان عام الوزارة من ناحية اخرى، أو دراسة مدى مناسبة تكاليف ادخال نظام معلومات التدريب ضمن نظام معلومات مشروعات التنمية المطية (٢). الذى اقامته شركة كيمونكس. وعلى ضوء نتائج هذه الدراسات، يتم تقرير استخدام النظام الالى لمعلومات الادارة .

- ١- تبين للفريق ان الادارات الماليه بالمحافظات قد التزمت بقيد مصروفات وحسابات المنحة الاجماليه فى النماذج الموضوع للنظام بوضعها دفاتر مساعد. وذلك علاوة على قيد نفس المصروفات والحسابات فى فى الدفاتر الحكوميه واستخدام الاستمارات الحكوميه فى صرف وتسوية السلف المؤقت الخاصه بالدورات التدريبيه.
كما تبين التزام ادارات الحسابات بالقوانين واللوائح والتعليمات الحكوميه، وعدم التزامها بما ورد فى خطاب تنفيذ المشروع رقم ١٤ من حيث صرف مكافآت المدربين والمشرفين انظر القيد.
كما تبين للفريق انه لا يوجد نظام للتقارير الدوريه فى الشؤون الماليه، يقوم بتوريد الاداره العليا والادارات المختصه بالبيانات والمعلومات اللازمه للتخطيط ووضع الميزانيات ومقارنه التكاليف واتخاذ الاجراءات التصحيحه فى الوقت المناسب.
ويكتفى باعداد البيانات بناء على الطلب وعرض المصروفات شفويا على لجنة التدريب بالمحافظة اثناء اجتماعها.
- ٢- وانتهى الفريق الى ان النظام الموضوع لمتابعة الشؤون الماليه يصلح الى درجة كبيره لقيد وتسجيل حسابات ومصروفات المنحه الاجماليه، وفى نفس الوقت ينقصه النماذج الخاصه بتوفير البيانات والمعلومات للاداره.
- ٣- ويوصى الفريق باعداد نماذج لتقارير متابعة المصروفات والتكاليف على النحو الذى يكفى فعاليه اعداد الموازنات وتحليل المصروفات على كل مركز من مراكز التكلفة وصولا الى تخفيض التكاليف الى ادنى حد ممكن.



ثالثاً- مدى قبول المحافظات لزيادة حصتها فى المساهمة فى المنحة الاجماليه للتدريب

تبين للفريق ان جميع المحافظات فى العينه الممثله توافق وترغب فى زيادة حصتها، وحدد المسئولون نسبة الزيادة فيما بين ١٠ - ١٥٪ من قيمة المنحة، وافادوا بانه سوف يتم تمويل هذه الزيادة من صندوق الخدمات بالمحافظات.

رابعاً- سداد مكافآت او اتعاب المدربين والمشرفين

يقوم بعض الموظفين العاملين بديوان عام المحافظة والمديريات التابعة لها، وبيديوان على الوزارة وبعض الاجهزة المركزيه، بالقاء المحاضرات وبتدريب المتدربين على مناهج المنحة الاجماليه للتدريب والاشراف على التدريب، ويتم ذلك فى اوقات العمل الرسميه، ويتقاضى هؤلاء الموظفون مكافاتهم خصما على صاب المنحة الاجماليه للتدريب.

ورغم ان اللوائح الحكوميه تجيز ذلك، فان دفع هذه المكافآت يتم بالمخالفة لنص المادة الرابعه من القسم الخامس من كتاب تنفيذ المشروع رقم ١٤ الذى اصدرته الامانه العامه للاداره المحليه بالاشتراك مع وكالة التنمية الامريكية حيث لاتسمح هذه المادة بدفع اجر اضافى او مكافآت فى اعمال التدريب التى يقوم بها الموظفون الحكوميون - الذين ليس التدريب من اختصاصهم المباشر - اثناء مواعيد العمل الرسميه حتى ولو لم تتعارض هذه الاعمال مع واجباتهم الوظيفيه .

وفد طلبت وكالة التنمية الامريكيه من المكتب الاستشارى للمساعدة الفنيه تنبيه المحافظات الى هذه القواعد، كما طلبت من سكرتير عام الامانه العامه اخطار المحافظات بعدم صرف مكافآت فى اعمال التدريب التى تمت فى اوقات العمل الرسميه واتخاذ الاجراءات التصحيحه اللازمه بالنسبه للمدفوعات السابقه

بمناقشة السادة المسؤولين فى المحافظات افادوا جميعا بأن دفع هذه المكافآت او الاتعاب امر جوهرى بالنسبة لتنفيذ التدريب، كما افادوا بالمبررات الآتية لاستمرارهم فى الصرف:

- ١- تضمنت توجيهات وارشادات نظام المنحة الاجماليه للتدريب اعداد برامج موجهة نحو حل المشاكل المطيه للتنمية، وتنفيذ انشطه التدريب مطيا بقدر الامكان ولهذا اعتمدت المحافظات الى درجه كبيره على نوى الضرب بمشاكل الاداره المطيه ومشروعات التنميه المطيه من العاملين فى الوزاره والسمخاففظات والمديريات والمجالس الشعبيه، وفى الوقت نفسه استعانت بأساتذة الجامعات والمعاهد الفنيه
- ٢- فى محافظة قنا، بصفه خاصه، ابدى المسؤولون ان التقاليد وعاده الأخذ بالثأر تقف تقف حائلآ دون حضور السيدات والانسات وايضآ الرجال بعد اوقات العمل الرسميد او مساء
- ٣- بالنسبه للتدريب الفني، وجدت المحافظات ان انسب اسلوب هو التدريب فى موقع العمل، وان اقدر الناس على تنفيذ هذا الاسلوب هم المهندسون العاملون فى مشروعات التنميه المطيه رقم (٢) بصفه خاصه ومشروعات التنميه بصفه عامه خاصة وانه قد تم تدريبهم بمعرفتى شركة كيمونكس وولبر سميث. وعلى نفسى المنوال، وجدت المحافظات ان اقدر الناس على تنفيذ التدريب فى الجمعيات الاهليه هم الاخصائيون العاملون بهذه الجمعيات. وبالإضافه الى هذا كله، كانت المحافظات تستعين بأساتذة من المعاهد الفنيه والاجتماعيه والجامعات

٤ - وحدت المحافظات أنه اذا ما أسندت التدريب الى القطاع الخاص فى العمل الرسمية، سوف يكون بامط النكلفه .

٥ - وأخيراً، سوف لا يشارك العاملون فى المحافظات فى نشاط التدريب الا اذا منحوا حوافز مناسبة .

ويمكن تلخيص الموقف فى أن خطاب تنفيذ المشروع رقم ١٤ لا يسمح بصرف مكافآت للعاملين فى الحكومة عن أعمال التدريب التى يقومون بها اوقات العمل الرسمية، بينما ترى المحافظات أن هذه المكافآت ضرورية جدا لضمان تنفيذ التدريب.

ويوصى الفريق باتباع أحد البديلين الآتيين:

١ - تقوم وكالة التنمية الامريكية باصدار استثناء من احكام المادة الرابعة / القسم الخامس من خطاب تنفيذ المشروع رقم ١٤ بحيث تسمح بصرف المكافآت فى أعمال التدريب التى تتم فى اوقات العمل الرسمية

ب - تقوم المحافظات بصرف المكافآت المطلوبه للمدربين والمشرفين من موظفى المحافظات والوزارة والمديريات خصما على حصتها فى اعتمادات المنح الاجمالية للتدريب وفى حدود عدد الصء ايا كانت نسبتها .

EXECUTIVE SUMMARY

The goal of the TBG activity is to contribute to the decentralization of the training process and to strengthen the institutional capacity of local training agencies to respond to local development training needs. The purpose is to develop the capacities of local institutions responsible for local training to respond better to pressing local training needs. The Assessment Team finds that the TBG program has made substantial progress toward achieving the purpose. With qualifications, the same can be said for the goal. The following summarizes the strengths and weaknesses of the USAID funded TBG program which is a component of LD II.

While the structure and operations of the TBG program varies among the Governorates, the program is comprised of essentially seven processes or systems:

- a planning process
- management by the Ministry of Local Affairs (MLA) Training Subcommittee in TBG activities
- coordination by the Governorate Training Committees (GTCs)
- a monitoring and follow up system
- a Management Information System (manual and computerized)
- a financial tracking system
- mechanisms to increase Governorate contributions to TBG funds

Strengths

- ♦ The Governorate Training Committees effectively manage and coordinate training at the Governorate level. This activity reinforces LD II training to meet technical, managerial, and social (PVO) needs at this level.
- ♦ The planning process is operational. It satisfies TBG guidelines, it addresses local training needs, and it involves local training entities.
- ♦ The TBG financial tracking system is adequate to monitor the allocation and disbursement of funds.

♦ There is remarkable willingness and capability at the Governorate level to increase the Governorate's share of TBG funds.

Weaknesses

♦ The MLA Training Subcommittee has not taken a leadership role to oversee, to manage, and to monitor GTC activities.

♦ The internal monitoring and evaluation systems are inadequate. They do not identify key issues. They do not adequately feedback information to the MLA Training Subcommittee for the planning and design process.

♦ There is no Management Information System (MIS) installed as was stipulated in PIL #14.

♦ There is a conflict between the GOE system and USAID regulations to reward trainers. The trainers are paid honoraria. The USAID system prohibits this. Unless this conflict is resolved, the TBG activity will be seriously jeopardized.

Recommendation

The Assessment Team recommends that LAD/USAID continue to support and fund the current TBG activity. It is a worthwhile effort, and should not be disbanded at this critical juncture in its development. LAD/USAID should also take the leadership to identify and hire a Technical Assistance Contractor which assists the TBG activity adequately. Many more specific recommendations are in the text.

**I. GOAL AND PURPOSE OF THE TRAINING BLOCK GRANT (TBG) ACTIVITY
AND OF THE TBG ASSESSMENT**

1. Introduction

The Training Block Grant (TBG) activity is a component of the Local Development II (LD II) project. LD II is designed to continue building the capacity of local institutions, public and private, to meet the basic needs of Egypt's rural and urban poor. It is a continuation of a preceding program -- the Decentralized Sector Support project. It is intended to encourage popular participation in development and in democratic decision-making. Activities are focussed around provision of essential services, such as the provision of water facilities, sanitation and roads.

2. Goal and Purpose of the TBG activity as a Component of the LD II project

2.1 LD Project Goal

The goal of LD II is to improve the quality of life of low income residents in rural and urban Egypt by providing greater access to essential basic services.

The development hypothesis being tested by this project is: if greater discretionary authority is granted to local governorates, as well as additional financial resources, their local councils will effectively discharge their increased responsibility to:

- ♦ develop cost effective programs to meet local needs
- ♦ increase popular participation in both decision-making and financing of local development initiatives
- ♦ ensure that essential basic services are delivered to low income residents

2.2 LD II Program Objectives and strategies

- ♦ Decentralization of authority and responsibility for local development
- ♦ Building democratic and popular participation
- ♦ Developing the capacity of local institutions
- ♦ Operation and maintenance of basic services at reasonable cost

◆ Local resource mobilization

2.3 Goal and purpose of the Training Block Grant Activity

The goal of the TBG activity is to contribute to the decentralization of the training process and to strengthen the institutional capacity of local training agencies to respond to local development training needs. The purpose is to develop the capacities of local institutions responsible for local training to respond better to pressing local training needs.

3. Purpose and task objectives of the Assessment of the Training Block Grant activity

3.1 The purpose of this Assessment is to determine the progress towards attaining TBG activity objectives, identify and assess any problems which inhibit implementation, and to provide recommendations to resolve issues and to improve performance.

3.2 Task Objectives

A. TBG planning process

◆ Do identification of training needs, setting of priorities and preparation of Governorate plans meet local development training needs and TBG guidelines?

◆ How involved are Governorate Training Committees (GTCs) in the planning process?

B. Ministry of Local Administration (MLA) Training Subcommittee's role in TBG activities

◆ How does the MLA Training Subcommittee coordinate TBG activities, establish policy guidelines and resolve implementation issues?

C. GTC's role in TBG activities

◆ How do GTCs coordinate TBG activities at the local level in terms of training needs assessment; and in terms of planning, designing, implementing and monitoring training programs?

D. Monitoring and follow up systems

◆ How well do the MLA training subcommittee and the GTCs monitor and follow up training programs?

◆ Does this monitoring and follow up identify key issues

and generate adequate feedback for the planning and design process?

E. TBG Management Information System (MIS)

◆ How useful is the MIS system as a management tool in terms of identifying implementation issues, undertaking special analyses, and providing feedback for the planning and design of new cycles?

◆ Should computerized MIS systems be installed in all 26 Governorates

◆ Is the MIS collecting baseline data required for impact evaluation?

F. TBG Financial Tracking System

◆ Is the financial tracking system an adequate mechanism for financial management of the TBG funds?

◆ What is the role of the MLA Training Subcommittee and GTCs in managing TBG funds?

◆ Do they follow GOE and USAID regulations?

G. TBG funding increase

◆ Is there willingness and capability at the Governorate level to increase TBG funds?

◆ Can alternative mechanisms (e.g., formula) be identified and used to contribute toward TBG sustainability?

See Annex D - Work plan for a complete description of the research objectives and methodology.

II. FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

This Assessment will review and analyze the data obtained during the Team's field visits, USAID interviews, and document review. Each of the following sections reflects the general tasks outlined in the scope of work. In the work plan specific questions were generated for each task area, and these guided the research agenda for the questionnaire.

What follows are the 1 - findings, 2 - conclusions and 3 - recommendations obtained from that questionnaire, interviews and documents. They will be presented as a set for each of the following sections:

- ◆ the planning process
- ◆ the role of the MLA Training Subcommittee
- ◆ the role of the GTC
- ◆ the system for monitoring and follow up
- ◆ the proposed system for a computerized MIS
- ◆ the financial tracking system
- ◆ the capability of Governorates to increase TBG funding
- ◆ the payment of honoraria.

A. TBG PLANNING PROCESS

1. Findings

There is a general awareness among the Governorates about the components of the planning process, its sequence, content, and expected outputs. In the absence of planning manuals, the Governorates depend mainly on their previous experience in planning; and upon the technical assistance offered to them from the TBG TA contractors.

The Governorates were oriented by the MLA and the TA contractor about the principles that guide the TBG planning process. These are as follows:

- ◆ The plan should be dedicated to strengthening the organizational structures, managerial capabilities, and personnel efficiency of the GTDs;

- ♦ Training programs should be integral parts of long term plans for personnel development;
- ♦ The planning of training programs should cover all relevant categories and levels of Governorate personnel;
- ♦ Programs should focus on problem solving and performance improvement;
- ♦ Job descriptions and analysis should be the base for planning;
- ♦ Training activities should be performed locally to the extent possible to increase the efficiency and relevance of training; and to strengthen the local capacity for delivering training -- thus keeping within the decentralization thrust of LD II;
- ♦ There should be maximum utilization of local training resources.

This Assessment found that the first principle -- strengthening the training capacity of the GTDs -- was considered in the plans. Three main categories of training programs were presented in these plans: managerial, technical, and PVO training; and these were to be implemented by the GTDs or equivalent units. Also the introduction of programs for training and planning specialists appears to contribute toward the managerial capabilities and personnel efficiency of the GTDs.

There was no evidence that long term plans for personnel development are available in the sample Governorates. Long term plans for this category, however, should extend to at least three years in order to respond to management needs.

Training plans focussed on middle management with line supervisors, technicians and some workers included in the training programs. No top management personnel were considered in the TBG plans. Again this is consistent with the TBG and LD II thrust to strengthen training capacity at the Governorate, District, and even the village levels.

In general, administrative courses concentrated on general principles of management; technical and PVO courses concentrated more on problem solving and performance improvement. However, many of the administrative courses were in O&M, and these included practical training in the use and maintenance of equipment, machines, and motors.

There was no evidence that job analysis and job descriptions were the basis for planning. The needs analysis was more *ad hoc* than

systematic, although in some cases job descriptions were used to help identify training needs more specifically.

The Training Plans developed by the GTCs and GTDs were based on complete utilization of local training resources. In some cases, regional resources were used.

2. Conclusion: The Governorate's plans followed the TBG guidelines for the most part, but omitted a systematic approach for needs assessment based upon job descriptions and analyses. In addition, a long term planning approach was lacking.

3. Recommendation: There should be a long term plan for the development of personnel in the Governorates, and the TBG program should be an integral part of this plan. In addition, the plan should be based upon a systematic and standardized assessment of training needs.

B. THE ROLE OF THE MINISTRY OF LOCAL ADMINISTRATION (MLA) TRAINING SUBCOMMITTEE IN TBG ACTIVITIES

1. Findings

1.1 Membership

While membership varies in each of the sampled GTCs, the membership is representative of TBG participating entities.

1.2 Managerial Role

1.2.1 Functions

- ♦ To assist GTC's in the planning process
- ♦ To facilitate the movement of documents to USAID and to the Technical Assistance contractor
- ♦ To orient the Governorates in the TBG program requirements

1.2.2 Accomplishments

Policy Guidance - The TA contractor prepared the policy guidelines, and they were introduced in orientation seminars to the Governorates by MLA. (Part of this MLA function was assisted by DAC.) MLA invited key members of the Governorates

to a Cairo seminar to introduce the TBG system, and to apprise them of the guidelines.

Training Plan Approval - In general, MLA approved each training plan with the help of the TA contractor.

Financial Tracking - Since each Governorate is independent in this matter, the MLA did nothing. However, MLA representatives acknowledged the disbursement statements in the accounting departments in the Governorates on field visits.

Orientation - See Policy guidance

Review Reports - Theoretically, when training programs deviate from the training plan, the MLA should react through field visits. In some cases this was done. Written feedback from MLA to the Governorates was given only when changes were needed to resolve discrepancies between the training plans and implementation. In other cases, the Subcommittee admonished the Governorates to keep to implementation schedules. For example, the MLA notified the Cairo Governorate that it was delaying the disbursement process, and that it must disburse funds more quickly so that other Governorates, which were affected by this delay, could receive their allocations on time.

Monitoring - There was a minimal amount of monitoring of the training plan and implementation. When it was done, it was done through field visits.

Evaluation - This was done on a case by case basis only. Reports were prepared when the Minister or some other high ranking official requests that an issue be looked into. No systematic evaluation was done.

1.2.3 Reporting

The Subcommittee received QPR's from the Governorates through the TA contractor. These consist of information regarding: training programs, target groups, training providers, program costs, financial status and disbursements, and summary of problems and recommendations.

There were also written requests from the Governorates to transfer funds from one training program to another, or to repeat rounds (often this is done over the phone). Also there GTCs' requests for new types of programs. In addition, there were written memos from the Governorates to change the Training Plans. The Subcommittee responded to these in writing.

It was inferred from the interviews that the reports and memos from the field regarding implementation progress were filed away and not acted upon. Also nothing was done in terms of feeding back information from these reports to the Governorates. They received no instructions from the previous MLA Secretary-General.

As far as reporting to the Technical Amana, there was no indication that the Subcommittee did so. The reports remained with the Subcommittee although they were available for review by members from the Technical Amana if they wished to review them.

1.2.4 Effectiveness

Overall, during the past three years of the TBG activity, the Subcommittee was minimally effective. The management style did not elicit sufficient participation from the MLA Subcommittee members. It did not consult regularly nor delegate tasks efficiently. Hence the Subcommittee rarely met, and appeared not to make any major management decisions. While it did orient the Governorates to the TBG guidelines early on in the program, regular contact with them through reporting was weak. The following summarizes the sample of Governorates who were visited by the Assessment team about their perceptions of the Subcommittee's effectiveness:

What type of assistance was received from the MLA Committee?

(Qina) GTC consulted the MLA committee on the surplus of TBG funds, and MLA responded to use them for repetitive courses. This happened only once.

(Dakahlaya) None

(Qalubiya) Approvals, comments on training plans and results of training.

(Sharkiya) Very weak. Some visits (4) from the MLA representative.

(Gharbia) None

(Cairo) none

Moreover, there are no indications that reports of field visits by the Subcommittee to the Governorates exist. There appeared to be minimal discussion of the reports which the Subcommittee received or generated. In addition, it appears that the Subcommittee depended too heavily upon the Technical Assistance Contractor to carry out the managerial functions mentioned above and the field visits. Overall, it could be said that the subcommittee did not facilitate the TBG process in the Governorates.

1.2.5. Subcommittee's Role in the Future

The following comments summarize the Secretary General's perception of the future role of the MLA Training Subcommittee.

Internal Assessment In the near future, the MLA Subcommittee will receive an assessment from IDC and the Governorates about the TBG process (not to be confused with the USAID assessment). Then, it will develop a full blown TBG plan, and this will put the MLA Subcommittee in a key and active role.

Division of Training - The MLA will expand and strengthen the role of the Division of Training within MLA, and a first under secretary will head it.

Sakkara Training Center - This Center will be available for training for all the Governorates. The Assessment will identify which training programs have been successful (e.g., O&M courses for water and roads), and these will be centrally implemented for all Governorates. In addition, those courses which are more or less the same for all Governorates (O&M courses again) will be delivered at the Center to groups of trainees from the Governorates. This could be considered a form of needs assessment as the successful courses will be repeated. Also courses will be given for the training of trainers at the Sakkara Center to strengthen the capacity for training at the Governorates. The MLA through the Division of Training will design new training programs for the Sakkara Center. It will prepare groups to visit the Governorates to introduce new concepts of the TBG. Finally, a research unit for training development will be established at the Sakkara Training Center.

When asked whether this emphasis upon centralized training conflicts with the decentralization objectives of the TBG, the Secretary General replied that he was not certain.

Leadership for TBG

The Secretary General intends that the Subcommittee will play a stronger leadership role to implement TBG in the Governorates. The MLA Training Subcommittee will meet monthly. He hopes that it will assess TBG activities on a continuing basis, and will "squeeze" the TA contractor to get the most information and action from it. Finally, there will be a standardized reporting system. This exists with the QPRs, but field reports will be standardized. The MLA committee will act upon these reports.

Management Information System for TBG - According to the Secretary General, the MLA is in no hurry for the Subcommittee to develop a computerized MIS system for training. It needs a clearer concept of how to plan and obtain accurate data for the TBG system. The whole country has a master plan for an MIS. The Cabinet will be the headquarters for the implementation of this plan. The MLA will have

hardware and software from the Cabinet, and will be linked to this master plan. LD II will also be linked to it. The focus now is to implement a computerized record system within the Finance and Personnel departments in the MLA.

2. Conclusion: The MLA Training Subcommittee until present has been weak and minimally effective in providing leadership to the Governorates to plan, implement and monitor the TBG program.

3. Recommendation #1: The Subcommittee should play a stronger leadership role for the Governorates by meeting more regularly, by reporting their reactions to Training Plans in a responsive manner to the Governorates, and by ensuring that the AID PIL Guidelines and regulations are adhered to.

Recommendation #2: The Subcommittee should consider carefully how it will be involved in its proposed plans to strengthen Sakkara Training Center and to establish a central Training Department as these actions relate to TBG. It probably would be wise for the Subcommittee not to exercise centralized authority over the GTCs which may oppose the decentralization concept and capacity building for training at the Governorate level. Rather, the Subcommittee should continue to assist the Governorates (but more effectively) to strengthen their training capability at the local level.

**C. THE ROLE OF THE GOVERNORATE TRAINING COMMITTEE'S (GTCs)
IN TRAINING BLOCK GRANT (TBG) ACTIVITIES**

1. Findings

This section will first identify key characteristics about the GTC structure in terms of membership and meetings; and in terms of relationships between the GTC and other Governorate units. Second, it will discuss the GTC coordination of TBG activities in terms of management operations. Third, it will discuss course development. Fourth, it will summarize relevant data regarding the completion of training to date. Fifth, it will discuss the funding of training. Finally, it will suggest what the TBG might look like in the future after AID funding for the activity ceases.

1.1 Structure

1.1.1 Membership

Despite variations in the composition of GTC membership, the GTCs represent relevant entities for developing training programs.

1.1.2 GTCs' Relationship to the Governor

With the exception of Cairo, the Governors take a strong interest in TBG, and are kept informed on a regular basis about the GTCs operations and decisions. In Qina and Garbiya, in particular, the Governors expressed a desire to establish training departments within their Office to ensure that training will be taken seriously throughout the Governorate. Clearly, a critical factor in the success or failure of a TBG program and GTC operations depend upon the interest and commitment by the Governor toward TBG.

1.1.3 GTCs' Relationship to Governorate Training Departments (GTDs)

In general, the GTC reviews, approves and updates the Training Plans and takes corrective actions to ensure implementation as appropriate. The GTD carries out more specific needs assessment, planning, implementation and reporting tasks. The GTC communicates with the GTD through the training manager.

1.1.4 GTCs' Relationship with the MLA Training Subcommittee

As noted above, the MLA has had a minimum of contact and interaction through field visits, reporting, and formal meetings with the GTCs. However, the GTCs have been able to interact with relevant units at

the Governorate level without any significant management nor monitoring from the MLA Subcommittee.

1.2 GTCs' Coordination of TBG Activities

There are numerous issues which are discussed in GTC meetings; and some are resolved. In general these issues include the key points in the training process: policy development, planning, construction of training programs, selecting instructors and contractors, coordinating local training entities, monitoring training results, and financial tracking.

Examples of more specific issues (and in some cases their resolution) include:

planning:

- discussion of the Training plan for PVOs and the contents of the PVO training program, such as the development of environmental programs
- defining who will design the training programs materials, as for example the how the Institute of environmental research at Aim Shams university will carry out programs.
- discussion in the Qina GTC focussed on where the training rounds were to be conducted. The rural rounds would be conducted in a rural training center, while the rounds of the Governorate employees would be held at the Governorate HQ. Other rounds would be held in the appropriate place for that type of training. The responsible unit would be advised on the round program before its implementation with sufficient time to select the trainees and to print the training materials.
- the planning department and the village development department will advise the DOA on any training rounds implemented in other places according to LDII to ensure no duplication of training rounds. The round costs are also discussed.

Implementation:

- Low attendance of trainees -- one GTC decided to send the training and equipment to the workers sites to facilitate their attendance.
- Instructors' inefficiency -- trainees complained that they could not understand the instructors. The GTC replaced them with more competent ones. Village Council says that it wants tailored courses for the village population. And they wanted additional courses. GTC set guidelines for the GTD to adjust the courses

accordingly.

- A GTC set the appropriate criteria for supporting the popular participation in project implementation

- Another set the training rounds for the coming month. This GTC meets once a month or upon demand of the DOA manager to discuss the training rounds

- regarding the scheduling of training, it sometimes happens that some training entities are preoccupied with scheduling their own training activities, and this may conflict with TBG activities. Hence the GTC decided to increase communication between it and the training entities to resolve the scheduling difficulties.

Funding:

- a GTC set the necessary plans for expenditures and maintenance

- discussion in another focussed on financial tracking, and it was decided that the TBG fund is allocated only for training. No other activities will be financed by TBG. In other cases, discussion focussed on the rules of TBG expenditures and incentives so as to regulate grant funding

- discussion centered on the possibility of financing training rounds from other resources and how to provide needed instructors and lecturers.

The GTCs receive both written and oral reports regarding training implementation. They receive from the training manager (ORDEV manager) training round reports, reports on trainee attendance, instructor performance, and evaluations of both trainers and trainees. In addition, they also receive financial information on the training rounds. The training manager also presents orally at GTC meetings planning, implementation and financial information as well as concerns or problems that may arise as part of these activities. All the GTCs have issued three or four QPRs to date.

1.3 Training Course Development

Training course development will be assessed in terms of needs assessment, course design, and course implementation.

1.3.1 Needs Assessment

The first general statement that can be made about training needs assessment is that there are a **variety of approaches** to identifying these needs at the Governorate level.

A second general statement is that training needs assessment in the Governorates **is not performed systematically**. There is no workable definition of needs assessment in LD II, TBG, TA contractor documents or in the USAID PIL #14. The Assessment Team found little or no evidence that anyone in the Governorates had been trained in the concept of needs assessment, its development, and its use as it relates to an MIS.

This is not to say that some common sense procedures are not being applied; nor that the Governorates do not understand that TBG funds should be spent on LD II projects. It is to say that there is no system of commonly accepted practices for conducting a needs assessment; and that there is no indication that an effective system is being developed. As indicated in the review of the Training Needs Assessment manual, high level decisions on the scope of training needs should be made before the TA contractors and the Governorates proceed to improve their assessment procedures.

1.3.2 Training Course Design

There are **different approaches** to designing and developing courses in the GTCs in the six Governorates:

While these differences in course design exist, the GTCs are designing and developing training courses **adequately**. There was no evidence that the Governorates suffered from serious deficiencies in course design and development. Limited interviews with instructors and trainees, as well as classroom observation (Annex C) indicated that the trainees were satisfied for the most part with the courses. Some of the training rounds examined indicated thoughtful use of training content. In addition, all Governorates keep previously offered courses on file, and they refer to them when designing new courses.

The use of course design manuals was uneven. In some cases none exist. In others, those developed by the CAO, Chemonics, Wilbur Smith, and the manufacturers exist and are used. In Governorates where the DOA is the main implementor of training for the GTC, courses tended to rely more on CAO materials. In addition, the design process could benefit from pedagogical training for course designers, especially at the directorate level where most of the course design takes place. It could also benefit from exposure to different instructional methods in the classroom because existing methods were mostly lecture.

1.3.3 Training Course Implementation

Three types of training courses are implemented: administrative/managerial -- much of which are O&M courses; technical courses; and social or PVO courses. While there is variation, respective agencies from these training areas implement these courses:

CAOA and university professors conduct administrative courses; managers and experienced individuals within technical departments conduct courses in their respective technical fields; and Social Affairs or PVO personnel conduct the PVO courses. In some cases personnel outside these entities conduct training such as university personnel. In general, however, 70% of the trainers were GOE employees. In administrative training, university professors participate heavily. Trainers from the private sector were very few.

Generally, these trainers provide courses that meet the required training needs. The training courses themselves are implemented in a straight forward, if not rudimentary, manner. Annex B describes some details of two training sessions which were observed. Emphasis is upon information and skill transfer. In these cases some of the trainees were illiterate, and so the level of training focussed upon basic knowledge and skills. However, traditional methods of "chalk talk" and rote learning were used. Perhaps, given the limited capabilities of some of the trainees, the sparse conditions of the training sites, and the limited time available for training (three to six days per training course), this approach is the most appropriate. It would be encouraging, however, to see trainers use some innovative instructional techniques which enable the trainees to participate more in the learning process. On the job training (OJT) complements classroom learning, particularly for O&M courses in technical areas. Here emphasis is upon problem solving and the development of skills. It is unclear, however, how the classroom learning relates to the OJT sessions.

1.4 Completed Training.

A surprising amount of training has taken place in the sampled Governorates during the short time that the TBG has been in existence. This has taken place in three areas -- administrative, technical and PVO training areas. The actual number exceeded that stipulated in the planned programs. In all the sampled Governorates the number of trainees who completed training exceeds 1000 per Governorate. In some cases, this number exceeds 1000 considerably. The ratio of male to female trainees is roughly 80:20.

1.5. Funding of Training

The most encouraging fact is that with the exception of Dakahliya, the Governorates spent most of the LE 105,000 which was allocated to them for one training year. This is remarkable given that they received only LE 10,000 per year from the central government before the existence of TBG. Clearly, there is a readiness and willingness to utilize training funds; and it appears that this utilization was relatively effective. This capacity to spend the funds indicates that the Governorates were capable of determining training needs (albeit unsystematically); were designing training courses; were utilizing

local training resources such as trainers and training sites; and were enabling the trainees to be absent from the work place to attend training courses.

1.6. Effectiveness and Future of the GTC

Over all the GTCs manage training operations and develop courses satisfactorily so that they implement training effectively. Responses from personnel in the six Governorates about GTC effectiveness were positive. In some cases, these responses came from the Governor himself. Evidence indicates that the broad participation of GTC members is in line with the goal and intent of TBG.

However, when AID funding for TBG terminates, the future of the GTC is uncertain. In most cases, the response to this issue was that the GTC will continue to function, but will manage a reduced TBG program. Nevertheless, the training will continue. In a few cases, it was suggested that the whole training effort, now implemented by TBG, should be taken over by the Governor himself. That is, those Governors who endorse training, are willing to have a training department established under their direct supervision. This seems to be a likely alternative to continue the training functions which TBG now fulfills, and which the GTC manages effectively.

2. Conclusions and Recommendations

There are numerous conclusions and recommendations for the functioning of the GTC. They will be lumped together under the above discussed sections. Where the Assessment Team found that Recommendations were not necessary, they were not inserted.

Conclusion #1: Because the GTC is headed by the Secretary General, it interrelates effectively with the Governor, committees, directorates and departments at the Governorate level.

Conclusion #2: The GTCs plan, coordinate, make corrective actions, and fund training activities effectively.

Conclusion #3: While the GTCs coordinate the training needs assessment, this process does not take place in a systematic nor standardized way.

Conclusion #4: Course design and development could be improved. In some cases, courses are designed effectively, particularly technical courses. In other cases, the design is broad, it is not always tied to practical manuals, and it suffers from traditional approaches to teaching and learning. This is particularly the case with administrative courses.

Conclusion #5: In general the courses are implemented satisfactorily. Local facilities are used. However, supervision is uneven though adequate. Instructional techniques are stereotyped and traditional, and need to incorporate innovative approaches.

Conclusion #6: Given the relatively short period that the TBG program has been operating, a surprisingly large amount of training has taken place in all the sampled Governorates in terms of the number and variety of programs as well as the number of trainees who have completed the courses.

Conclusion #7: The Governorates have a high capacity to receive and disburse training funds. Before the TBG program, they received only LE 10,000 per year for training; during the TBG training cycles, they received ten times that amount, and most of the sampled Governorates were able to disburse the entire amount.

Conclusion #8: Training costs were reasonably low with an estimated unit cost of LE 8 per trainee day. This compares favorably, for example, with LD II technical training costs which run much higher in some cases. In addition, about 50% of these costs were for the trainees, 35% for the trainers, and 15% for other expenses.

Conclusion #9: Despite variations in GTC performance (Cairo and Dakahlaya being on the lower end), the GTC is a viable and effective organizational unit to manage and coordinate decentralized training.

Conclusion #10: The Governors are critical factors in supporting and strengthening the GTC.

Recommendation #1: Course development needs to be improved. Training managers and course designers/developers from the Directorates, CAO and the PVOs need a comprehensive training in needs assessment, course design, implementation and evaluation. Appropriate manuals should be developed, and it is further recommended that these trainers (as trainees) develop them in workshops for themselves as part of their training program.

Recommendation #2: Given the need to strengthen training at the local level, it is recommended that mobile training units be explored as an alternative to meet training needs of trainers and trainees in rural and distant training sites.

Recommendation #3: Governors who are interested and supportive of training (in general) should be encouraged to upgrade their GTCs, to add manpower planning to it, and to put the GTC under their direct supervision.

D. MONITORING AND FOLLOW UP SYSTEMS

This section will describe how well the MLA Subcommittee and GTCs monitor and follow up training programs (M&F); and whether this monitoring and follow up identifies key issues and generates feedback for the planning and design process. It will first introduce the commonalities in the M&F system, and then will describe the differences.

1. Findings

Commonalities

1.1 MLA has not played its role as it should in monitoring the training programs. There is no evidence that MLA has made any corrective actions, issued new directives, conducted re-orientation seminars, or made any macro QPR's. Forms designed for field visits by MLA (Field Visit Check List TBG 2 - DAC) were not used.

1.2 GTC follows up the progress in the Training Plan implementation mainly through review of the QPRs prepared by GTD and oral presentation by representatives from GTD; and by oral presentations by representatives from the Directorates. However, this procedure has not enabled the GTCs to evaluate accurately the impact of training upon the trainees.

1.3 The M&F system has the potential for expansion into a computerized system. However, the system does not yet have the specific components to define:

- ◆ key issues
- ◆ adequate feedback for updating the training plans
- ◆ design of training programs
- ◆ evaluation of the impact of training

1.4 CAO A introduces different forms for monitoring from those used in TBG. For example, in the Governorates of Qalubiya and Cairo, where DOA is supervising the training, CAO A forms are used for trainees, course evaluations, and in the follow up of the graduates.

1.5 The M&F system is essentially a "bottom to top" type of reporting whereby trainees' and trainers' evaluation forms, and round reports go from the training sites to the Governorates. In some cases, however,

this information is incomplete as some trainees at the village level are illiterate, and cannot complete the forms. There is no feedback from the Governorates back down to the training sites, except for occasional visits by the GTC training manager or other relevant officials.

1.6 There is no systematic attempt to assess the improvement in trainee competency. There are no forms nor reports to assess job performance of the trainee once he has returned to the job site. However, in Qina and Qalubiya the work managers express their opinions about training effectiveness to the GTC training managers informally and occasionally, based upon their perception of how the former trainees are performing on the job.

1.7 There is advanced notification to trainees about the date when the training courses will start. This period ranges from 10 to 30 days in all the Governorates.

1.8 Supervisory practices are surprisingly similar. In four of the six Governorates, there exists a formal and organized system of monitoring and supervision. These include class visits, reviewing course outlines and materials, reviewing schedules, and in some cases, use of trainer and trainee evaluation forms and attendance records.

Differences

1.9 There are also differences in the supervisory practices among the Directorates. In some cases, the information about the adequacy of the training course is delivered orally from the trainees in group discussion with the trainer and his supervisor; in other cases, the trainees write their assessments in forms prepared for this exercise. In addition, the monitoring and follow up manual of the TA contractor is not complete nor distributed adequately. Hence, there is no common TBG approach. There is also a difference on how training supervision is organized in the Governorates.

2.0 **Conclusion:** The monitoring forms, by and large, are rudimentary in design and construction. Their wording and sequence of items are haphazard and inconsistent. In addition, the follow up of trainees after the training courses is uneven, if not absent, and needs to be carried out more systematically.

3.0 **Recommendation:** The monitoring forms need to be improved to gather sufficient and accurate information to determine whether or not trainees benefit from training on the job. Trainee follow up also needs to be improved so that it is done regularly and systematically. Follow up should also consider ways to reinforce the training experience for trainees (e.g., information exchanges for trainees after termination of training).

E. TBG MANAGEMENT INFORMATION SYSTEM (Computerized)

There are no computerized MIS systems in the Governorates presently for the TBG activity. Hence, the questions in the work plan regarding their utility, and whether the MIS collects base line data for impact evaluations are not applicable. However, discussion will include the possibility of installing computerized MIS systems in all 26 Governorates for TBG.

First, this section will address the current status of MIS in the Governorates. Second, it will discuss the possibility of introducing MIS systems in the Governorates. Third, it will describe briefly the MIS User's Manual developed by the TA contractor IDC. It will also describe the current MIS which the TA contractor for LD II -- Chemonics -- has developed. MIS in this section refers only to computerized systems unless otherwise stated.

1. Findings

1.1 Current Status of MIS Systems in the Governorates

As stated above, no Governorates are presently operating an MIS for TBG. However, there is general support for the idea of an MIS in the Directorates and a willingness to try it out. Most Governorates expect to install an MIS in the near future, and some have set installation dates.

Unfortunately, there is little mutual understanding among the Governorate personnel affiliated with TBG operations as to what an MIS is, and what is involved in its implementation. Most assume that an MIS is computer based, that computer training is necessary, and that it would be easy to install since computers exist in the Governorates. Other than these broad conceptions, there is little understanding of the components, structure and operations of an MIS as well as its strengths and weaknesses. In addition, the Governorates see each MIS as their own, and are unaware of the possibility of a common MIS for all of TBG activities being installed.

As stated in the MLA section of this report, the MLA is considering the development of an MIS, but one that is tied to the Master Plan for an MIS in all Governorates. This would be far more comprehensive than a TBG MIS system, and would include data on local administration activities. A component of this system would be a TBG MIS. However, there is no priority within MLA to develop the TBG component of this system, and this will come after the financial and personnel tracking components are developed.

1.2. Introducing MIS Systems in the Governorates

It is technically feasible to install a training MIS in the Governorates at a modest cost. This is mainly because computers and relevant software packages already exist there. In addition, some the Governorate personnel have been trained to use these packages. Also, as stated above, there is a definite willingness by the Governorates - and in some cases strongly expressed by the Governors -- to have an MIS installed and operating in the Governorate headquarters.

What would such an MIS look like? It might include some of the following elements:

- ♦ Local Development II projects
- ♦ PVO projects
- ♦ Personnel in Governorate headquarters who will operate the MIS
- ♦ Personnel in the Directorates who will feed information to the MIS in the Governorate
- ♦ District, cities and villages, and popular councils which are participating in TBG.
- ♦ Target personnel to be trained (names, age, positions, qualifications, previous training, and position requirements in terms of knowledge and skills)
- ♦ Training programs (objectives, course descriptions, evaluation criteria, class schedules, cost estimates, source of funding, expenditures, instructional mode, and the instructor's name, position, and qualifications)
- ♦ Training costs (budget data, financial reports and disbursement data)
- ♦ Trainees (name and number, curricula information, previous training, course progress, evaluation, post training information)
- ♦ Training program assessment
- ♦ Local training facilities
- ♦ External training providers or related data.

1.3 MIS Users' Manual

The TA contractor IDC has developed an MIS Users' Manual to assist Governorate staff to install and operate an MIS system. It contains

information and recommendations on hardware and software (English).

It recommends that information be gathered regarding relevant operations in the Governorate, training places, training plans, training rounds (including activity information about course start and end, dates, number of trainees, etc.), program types, training types, training objectives, training mode training material and training budget. It appears that it is not possible to compare actual round data against planning data; hence it would be difficult to prepare summary documents for the QPRs.

This document appears to be a reasonably competent effort to enter and process the information for the QPRs now being used in the manual MIS system. Without actual reports, however, it is difficult to determine how the system will actually operate on the recommended software and hardware; and what the printed reports will look like. The document is written as a "users" manual, but it is weak in documentation. There is no indication as to who the user will be. While some data entry information is provided, it does presume some additional training for the data entry operator. If this person is presently situated in the Information Systems (I-S) Directorate of the Governorate, only a minimal amount of additional training may be needed. If the data entry clerk is in the training office with no prior experience, the effort would be greater.

The Manual lacks the following:

- information for supervising review
- emergency instructions
- systems flowcharts
- program flowcharts
- test data
- sample input and output documents
- control procedures and who should perform them
- description of user accuracy check

Despite these limitations, attention should be paid to this Manual as a "first cut" to develop a computerized MIS for TBG.

1.4. The LD II MIS

Chemonics has developed a comprehensive MIS for the LD II project which has been operating since 1988 in all the Governorates. This MIS includes training records. Each Governorate has an IBM XT computer

(to be upgraded to the 386 level with 25 Mhz and 200 Mg hard drive capacity). The MIS is in English and Arabic. Data is fed to the Governorates from the District level on a quarterly basis; the Information System personnel at the Governorates assemble the data and then feed it to Chemonics headquarters in Cairo.

The structure of the this MIS includes the following components:

- ♦ Financial tracking. 14,000 projects are tracked according to the format and data entry sets in the QPRs. This includes information on the project allocation, "investment" (estimated return on the amount spent), and expenditures.
- ♦ Technical information. For example, for a water project this would include information on the number and sizes of pipes, pumps, wells, etc.
- ♦ Contractor information. This includes the name, amount awarded to the contractor, status of the contract, tending information, award date, and date for handing the project over to the GOE.

There are a few problems. Some of the Governorates may have up to 10 computers. Each is allocated a specific function. Thus, one computer may be used only for operating the LD II MIS, and Governorate personnel may not see it appropriate to add on a TBG MIS component to that system. Second, printing is a problem. Most Governorates have Epson FX models, and it is difficult to print the Arabic data on these printers in compressed form. The LD II project may be replacing these printers with Star Micronics printers. These can handle Arabic print easier and can also be serviced readily in Egypt.

A fourth component -- the training tracking component of the LD II MIS comprises:

- ♦ Course information. This includes a detailed analysis of course authorship, support materials, and where it has been delivered previously.
- ♦ Trainee information. This includes the name and home address of trainees, a list of courses previously taken, and a score or grade received on these courses.
- ♦ Cost information. This includes information on cost of each course per trainee day. For LD II courses these costs varied from a low of LE 10 to a high of LE 300.
- ♦ Historical information. This includes lists of courses that have been taught previously as well as the dates, times and number of trainees enrolled in each course.

This MIS incorporates all the topics and data now included in the TBG QPR reporting structure.

According to the LD II MIS manager, Dr. Paul Hoover of Chemonics, it would be quite feasible to add to this MIS a comprehensive component for TBG training such as that suggested above. The advantages of doing this are that a system is already in place and is operating. This system has the capacity for detailed data gathering and reporting, and the reporting is done in both English and Arabic. It would be quite simple to create a menu whereby the TBG MIS would be one component which Governorate users could select. Finally, there are trained personnel in the Governorates who could operate a TBG MIS system. There are the problems of "ownership" and printing mentioned above, but these could be overcome through orientation courses on the use of the TBG MIS and the installation of more efficient printers, respectively.

2. Conclusion: There is no computerized MIS in the Governorates, but there is a potential and interest there for developing one. In addition, there are existing alternatives in the IDC User's Manual, and in the LD II MIS system. However, as noted in the discussion of the MLA, the Secretary General does not see the development of a computerized MIS for TBG as a priority.

3. Recommendation: USAID through its TBG technical contractor should conduct a feasibility study to determine whether it would be cost effective to develop a computerized MIS for TBG as part of the existing LD II MIS system developed by Chemonics.

F. FINANCIAL TRACKING SYSTEM

This section will review the Financial Tracking system according to: (i) how the TBG funds are managed; (ii) how the TBG accounting system operates; and (iii) how the financial tracking system operates in the sample Governorates.

1. Findings

1.1 Management of TBG funds

1.1.1 MLA level

The General Amana had issued a circular (in Arabic) to all Governorates on TBG financial rules and instructions according to the financial tracking system design. The Amana and the MLA Training Subcommittee have no role in managing TBG funds because the Governorates are independent by law in their financial affairs.

Thus, the MLA has no role in managing TBG funds.

1.1.2 Governorate level

The Secretary General is the only officer authorized to disburse TBG funds. The TBG training manager presents to the Secretary General the requests for temporary loans needed for conducting training rounds. The rounds administrative supervisor receives the temporary loan amount in cash. He then purchases the necessary stationary and materials. He also pays trainers' fees, the trainees' per diem, and other costs according to GOE procedures and regulations. The administrative supervisor prepares the training round report that includes the round costs.

The Accounting Department reviews the temporary loan documents, and enters the expenditures into the GOE ledgers. Then, the TBG expenditures are entered into the tracking system forms as an assistant ledger.

The GTC considers only the QPR. This report includes the Quarterly disbursement, the previous disbursements, and the reasons for a difference between planned and actual disbursements (if any). The GTC controls the TBG disbursements through oral presentations of QPRs in its meetings. However, there is no evidence of any corrective actions taken regarding the differences between the planned and actual costs. There is no control regarding the administrative supervisors purchases and payments. Specifically, this is in regards to the amount of stationary which is fixed at LE 50 per round (although the number of trainees per round may vary). The trainers' honoraria are paid for training in work hours for GOE employees. Training is outside their normal duties.

There are no quarterly cash management reports.

1.2 TBG Accounting System

The Secretary General manages the accounting operations overall. The training round administrative supervisor receives from the accounting department the temporary loan's amount in cash, and pays the trainers and trainees as noted above. The supervisor prepares the documents and the receipts necessary for loan settlements according to GOE procedures. The Accounting Department receives the loan documents, makes the settlements, and enters the expenditures in the GOE ledgers according to GOE procedures and forms. The Accounting Department also enters the same expenditures in the Tracking Forms (six DAC forms: Bank account, training rounds account, training program account, total cycle expenditure account, final training program account, and final Governorate Training Plan Account). The Accounting department had not made any financial reports.

Overall, it can be said that there is an adequate recording system. Also, this system adheres to the GOE regulations, procedures and forms.

However, there is non compliance to the USAID Project Implementation Letter (PIL) #14:

- ♦ payment is made to trainers within the working hours, when the PIL stipulates that any honoraria must be paid outside of working hours.

It must be noted, however, that PIL #14 was not translated into Arabic and distributed to the accounting departments in the Governorates.

1.3 Operations of the Financial Tracking System

The Governorates' financial department is the responsible body for all TBG financial and auditing operations, except in the Cairo Governorate where the DOA is the responsible department. Disbursements from TBG funds are according to GOE instructions and the Governorates' regulations. Again, it must be stated that the honoraria to trainers, supervisors and other auxiliary workers are not consistent with PIL #14.

The system's six recording forms are used in all the Governorates. Final settlements regarding entries into forms 5 and 6 are under preparation.

The General Amana circular provides that the financial documents will be kept in the Governorates' Accounting Department (not the Training Department) in order to be available for auditing by CAO. A.

Thus, the tracking system is adequate for accounting and recording. However, it is not adequate for financial management of TBG funds because:

- ♦ it does not include reports that provide the Secretary General and the GTC with needed data for budgeting and cost reduction
- ♦ it does not provide data for comparative costs of the training rounds of comparable programs.
- ♦ it does not relate projected training costs with anticipated training needs.
- ♦ it does not provide the GTC with accurate data needed for planning the next cycle.

2.0 Conclusion: There is an adequate financial recording system, and it adheres to GOE systems and procedures. However, it is not adequate for financial management of TBG funds.

3.0 Recommendation: There is a need to develop a financial management system as part of the existing tracking system to analyze disbursements, to assist in budgeting, to calculate unit costs so as to compare costs, and to help determine cost effective alternatives in TBG activities.

G. TBG FUNDING INCREASE

1. Findings

1.1 GOE/Governorates' willingness and capability to increase their share of TBG Funds.

All of the six sampled Governorates are willing to increase their shares of the training costs to retain TBG funding. The Governorates consider a 10-15% contribution to the TBG funding a reasonable and feasible local effort on their part. The Governorates would contribute to the TBG effort through the Governorates' service fund.

Another suggested alternative by the Governorates is to provide free training facilities to TBG activities. In fact, the Assessment team found that only minor amounts were spent on rent for training facilities. Officials at the six Governorates informed the team that local facilities were surveyed and used in TBG training, especially the CAOAs facilities in the Governorates. For technical training, the training work place were usually training rooms within the respective technical department. Also, university facilities were used when available at no cost to TBG.

1.2. A suggested formula for calculating the Governorates increased share of TBG funding.

After the experience of the first TBG cycle, it is possible to allocate TBG funds based upon actual training needs. The needs statement is a base for introducing a formula for determining in advance just how much the Governorates should be prepared to increase their share of funding.

A suggested formula might be as follows:

- ♦ it would be necessary to have a precise statement of what the training needs are for the next training cycle.
- ♦ the training programs would have to be identified and specified so that the training needs can be met.
- ♦ an estimate must be made of the number of trainees expected to participate in the programs.

♦ a unit cost must be identified (average cost per trainee day -- say LE 8) to calculate the overall cost of the anticipated training program for an annual cycle.

♦ 10-15% of this total would be the Governorates' contribution to increase their share of TBG funding.

2.0 Conclusion: There is a capability and willingness on the part of all sampled Governorates to increase their contribution to training costs so as to retain the TBG fund. They consider a 10-15% contribution to TBG funding to be a reasonable contribution. In most cases, this contribution would come from Governorates' service funds.

3.0 Recommendation: The MLA Training Subcommittee should take this Assessment's suggested formula to identify the amount of increased local contribution to TBG -- or develop a formula of its own -- and initiate its use through pilot activities in selected Governorates. Based upon the results of these activities, the Subcommittee can recommend to the Governorates specific conditions and ways to develop practical alternatives or formulae to increase local cost sharing for TBG.

H. HONORARIA PAYMENTS

1. Findings

Some GOE employees from Governorates and central agencies' staff work as lecturers and trainers for the TBG program during normal working hours. These employees are being paid honoraria from the TBG account. Such honoraria is authorized by GOE and Governorates' regulations as stipulated by the CAO. However, payment of this honoraria under the USAID TBG PIL #14 is made under the following (among others) stipulation:

"Nominal and occasional payments of honoraria to GOE officials, providing these payments are for functions outside their normal duties, and do not take place during normal working hours or otherwise conflict with official dates. These payments should not be on a frequent and recurring basis" (Clause 4 of Section E).

This clause does not allow payment of overtime for GOE officials from TBG funds. Nor does it allow payment to GOE officials performing tasks outside the scope of work within their normal working hours.

On February 18, 1991, the Secretary General of MLA agreed to provide USAID with a justification for such payments. If such payment is crucial for the implementation of TBG, LAD/USAID should seek an approval for it. On March 12, 1991, LAD/USAID asked the Secretary General of MLA to instruct the Governorates not to disburse such

honoraria payments and to take corrective action for any previous payments.

The Assessment Team finds the payment of honoraria to relevant GOE trainers for TBG to be crucial for the implementation of the program. This is because:

- ◆ local culture and customs do not allow female personnel to attend (and in a few cases) conduct training after hours;

- ◆ training should focus upon "problem solving" activities. The best approach to deliver this is through OJT. The most capable trainers are the LD II project engineers and technicians. They can conduct training only during working hours. Without this honoraria payment as an incentive, they will not participate in TBG training.

- ◆ while provision of training can be conducted after hours by private sector trainers, it will be costly.

2. Conclusions

USAID/TBG PIL #14 does not allow payment of honoraria to GOE employees functioning as trainers in their normal working hours. Governorates consider Honoraria payment crucial for TBG implementation. Without this incentive, GOE employees will not participate in the training effort. In addition, GOE regulations authorize the payment of honoraria.

3. Recommendations

3.1 That USAID waive Clause #4, Section E of PIL #14 as it applies to GOE employees so that GOE employees can train with an honoraria payment during working hours.

3.2 That GOE employees who serve as trainers take leave from their regular positions during training courses. This would enable them to train outside of their normal duties and to do so outside of normal working hours. The leave of each GOE employee/trainer would be coordinated to ensure efficient delivery of training courses.

A N N E X A

THE ROLE OF THE GOVERNORATE TRAINING COMMITTEE'S (GTC'S) IN TRAINING BLOCK GRANT (TBG) ACTIVITIES

The purpose of this section is to describe and analyze how the GTC coordinates TBG activities at the local level in terms training needs assessments, planning, designing, implementing and monitoring training programs. Data for this section comes from seven sources: (i) formal interviews with the Secretary General of the Governorate, some GTC members, and some GTD employees; (ii) responses to the questionnaire used for visits to the Governorates; (iii) field visits to training locations; (iv) review of manuals; (v) review of sample curricula, trainers' qualifications, trainees qualifications and training supervisors' reports; (vi) review of monitoring and follow up of training programs; and (vii) relevant USAID/TBG documents.

This section will first identify key characteristics about the GTC structure in terms of membership and meetings; and in terms of relationships between the GTC and other Governorate units. Second, it will discuss the GTC coordination of TBG activities in terms of management operations and course development. Third, it will review relevant data regarding the completion of training to date. Fourth, it will discuss the funding of training. Finally, it will suggest what the TBG might look like in the future after AID funding for the activity ceases.

1. Structure

1.1 Membership

According to the decrees issued by the Governors of the sample Governorates, GTC membership is organized essentially as planned in the system of Block Grants. The GTC membership in Qalubiya has the most extensive membership of the six sampled Governorates, and illustrates the range of members.

Qalubiya GTC Membership

Secretary General (Chairman)	Manager of the O&A Directorate
Assistant Secretary General (Vice Chairman)	Manager of Social Affairs
Manager of Planning (Rapporteur)	Governorate Economic Consultant
Training Coordinator	Manager of Housing Directorate
	Manager of Manpower Training

Manager of Financial Dept

Manager of Local Development
Dept

Professor, Environment
Institute, Ein Shams
University

Dean, Environment Institute,
Ein Shams University

However, there is considerable variation among the six sampled Governorates in terms of the number of members and the organizations which they represent as is illustrated in Table 1.

TABLE 1

GTC MEMBERSHIP IN SIX GOVERNORATES

GTC FORMATION	4/10/89 QALUBIYA 1988/199 DECREE #	DAKAHILYA (9/24/1988) DECREE#	12/13/88 QENA (11/889/20/89)	5/28/90 SHARKIYA	8/15/89 GHARBIYA	CAIRO
CHAIRMAN	SECRETARY GENERAL	ASSISTANT SECRETARY GENERAL	SECRETARY GENERAL		SECRETARY GENERAL	
DEPUTY	ASSISTANT SECRETARY GENERAL		ASSISTANT SECRETARY GENERAL			
MEMBERS GOV H.Q.	PLANNING- GENERAL MANAGER - DEPUTY VDD - MANAGER FINANCIAL AFFAIRS- MANAGER TRAINING COORDINATOR * ECONOMICAL CONSULTANT	- - ORDEV VILLAGE CONSTRUCTION & DEVELOPMENT PERSONAL AFFAIRS- MANAGER - -	PLANNING MANAGER ORDEV MANAGER - -	VCD	VCD	PLANNING - PERSONNEL GM FINANCIAL ADMINISTRATIVE UNDER-SEC. CONTROLLER
ORGANIZATION / DIRECTORATES	SOCIAL AFFAIRS - GM MANPOWER & TRAINING G.NM. DOA - DEPUTY HOUSING - DEPUTY FINANCIAL - MANAGER	SA REPRESENTATIVE MP. MANAGER {DOA MANAGER } {TRAINING MANAGER} -	PVO MANAGER GENERAL MANAGER MANAGER	SOCIAL AFFAIRS G.M. DOA MANAGER HOUSING MANAGER	PVO DOA	MANPOWER DOA
EXTERNAL ORGANIZATION	TECHNOLOGY INSTITUTE-DEAN ENVIROMENT INSTITUTE-DEAN -PROFESSOR	*			SADAT ACADEMY/TANTA	
RAPPORTEUR	GENERAL MANAGER OF PALNNING	** VCD/T.SECTION HEAD	* VCD	ADMMIT.C/CO.	VCD/T.MANGER	DOA/T.CENTER MANAGER
TOTAL	16	7	9	6	6	9

* The committee is authorized to get support from organization related to training

** VCD Manager (informal rapporteur

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Despite these differences in the composition of the TBG membership, the general functioning of the TBGs are surprisingly similar as will be seen.

The dates of the initial meetings of the GTCs ranged from December, 1988 (Dakahliya) to May, 1990 (Sharkiya). In all the Governorates but one, the GTCs meet monthly; in Dakahlaya, it has met only three times.

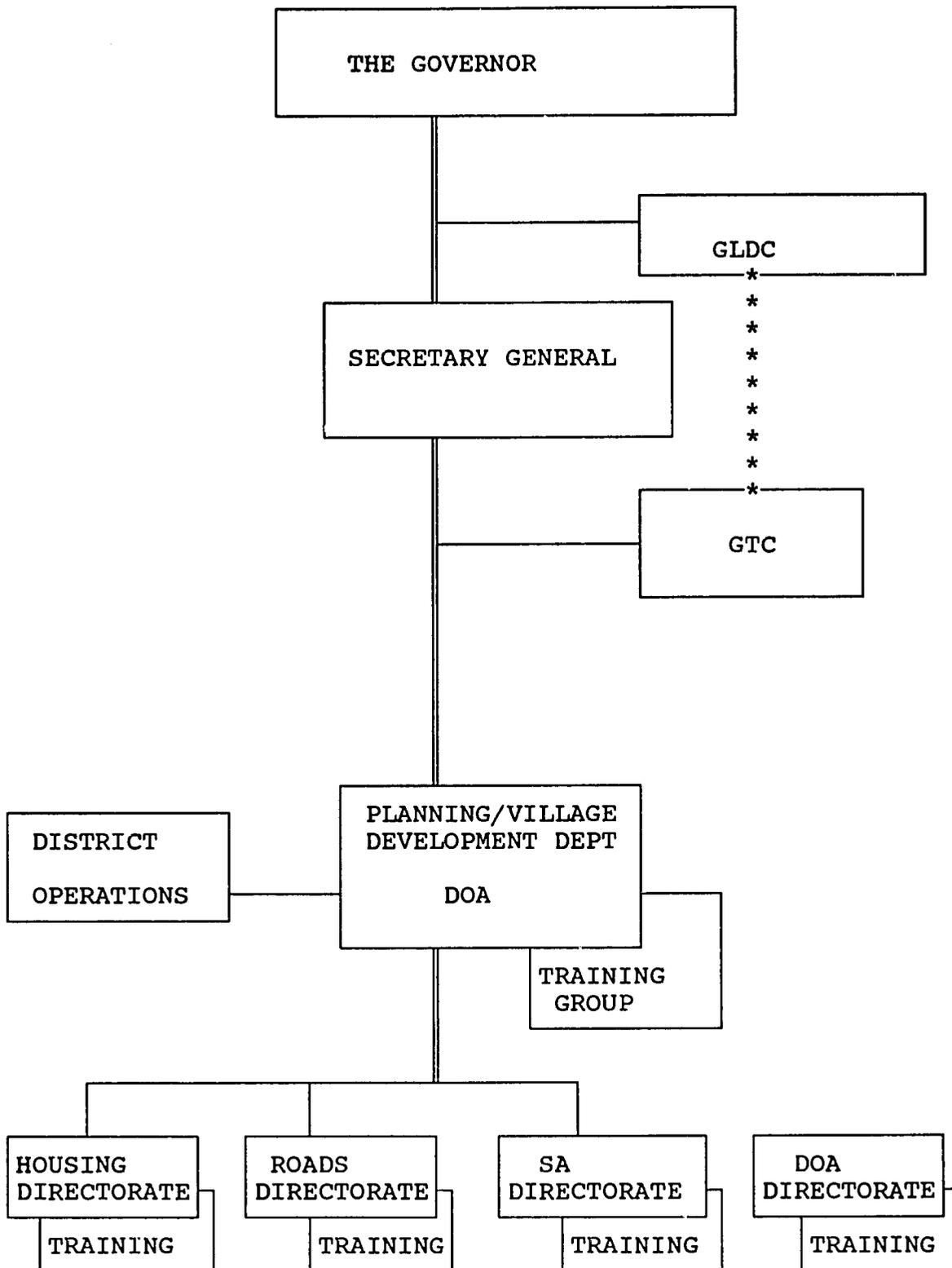
1.2 GTCs' Relationship to the Governor

With the exception of Cairo, the Governors take a strong interest in TBG, and are kept informed on a regular basis about the GTCs operations and decisions. In Qina and Garbiya, in particular, the Governors expressed a desire to establish training departments within their Office to ensure that training will be taken seriously throughout the Governorate. Clearly, a critical factor in the success or failure of a TBG program and GTC operations depend upon the interest and commitment by the Governor toward TBG.

Table 2 illustrates GTCs position in the Governorates and its relation to the Governor. For the most part, it relates to the Governor through the Secretary General. However, there were some differences. In Dakahliya, Qalubiyah, and Qina, the rapporteur presents training plan approvals, suggestions and recommendations to the Governor through the GLDC. In these cases, the Governor heads the GLDC. In Cairo, Sharkiya and Gharbiya by contrast, the GTC deals directly with the Governor through the Secretary General who is the chairman of the GTC. He presents all the decisions and recommendations made by the GTC to the Governor.

Table 2

THE GTC'S STATUS IN THE GOVERNORATE



1.3 GTCs' Relationship to GTDs

In general, the GTC reviews, approves and updates the Training Plans and takes corrective actions to ensure implementation as appropriate. The GTD carries out more specific needs assessment, planning, implementation and reporting tasks. The GTC communicates with the GTD through the training manager. This is illustrated in Table 3.

**TABLE 3
GTC AND GTD INTERRELATIONSHIPS**

GTD	GTC
- T. needs statements & analysis	
- requested Training programs	
- suggested T. providers or instructors	
- T. secretarial plans	
- draft comprehensive plan	
	<----- approved comprehensive T. plans
- T. round's reports	
- T. program's reports	
- QPRs	
- T. implementation conditions (oral)	
- evaluation of Trainees & Trainers	
- T. data	
	<----- updated T. plans
	<----- corrective actions
	<----- Meeting's minutes

In reality, however there are differences. In some Governorates there is a strong and operational GTD with whom GTC interacts; in a few the GTD is weak or virtually non-existent although key individuals operate as if they were GTD members. This is summarized as follows:

♦ In Dakahliya there are two training specialists that work as GTD members under the supervision of the General Manager of Village Development Department. This group reports to GTC about training implementation. It has been effective coordination. It can improved through designing periodical reports.

♦ In Sharkiya the GTD is represented in GTC. The coordination is good. It could be improved by expanding GTC to include manpower planning.

♦ In Gharbiya the GTC is established according to TBG requirements. It meets regularly to consider reports of training programs as presented by GTD. GTD is located in the training department of ORDEV.

♦ In Qina GTD does not formally exist. There is a Training Group instead of a Governorate Training Department. GTC relates to this group through the Village Development Department. The Training Group works as a secretary for GTC. GTC relates to this group through the Village Development General Manager who is the rapporteur of GTC. This coordination is effective. However, the Training Group should be expanded to become a GTD. The GTC does not manage courses funded through sources other than TBG.

♦ In Qalubiya there is no GTD. The Governorate is preparing to establish a GTD as a part of the Governorate organizational structure. Currently, a group from DOA employees are performing the recording and filing operations.

♦ In Cairo, the DOA is the training manager and is GTC's rapporteur.

1.4 GTCs Relationships with the MLA Training Subcommittee

As noted in the Findings above (B 1.2.4), the MLA has had a minimum of contact and interaction through field visits, reporting, and formal meetings with the GTCs. Thus the GTCs have been able to interact with relevant units at the Governorate level without any significant management or monitoring from the MLA Subcommittee.

2. GTC Coordination of TBG Activities

This subsection will address this coordination from two aspects: management activities and course development.

2.1 Management activities

2.1.1 Functions: According to decrees issued by the Governors in the six Governorates, the GTCs' functions are to:

- ♦ define the training needs and their priorities
- ♦ define the training program's priorities, standards, and contents
- ♦ review sectoral development training plans, coordinate them with plans financed by the GOE, and prepare annual training plans
- ♦ survey local training facilities and define what could be utilized.

The ORDEV manager in five Governorates, and the DOA manager in Cairo - both functioning as training managers -- enable the GTCs to fulfill most of these functions. Key actors on the GTC who assist them are: the planning, social affairs, accounting and housing managers within the Governorates.

2.1.2 GTC Meetings: There are numerous issues which are discussed in GTC meetings; and some are resolved. In general these issues include the key points in the training process: policy development, planning, construction of training programs, selecting instructors and contractors, coordinating local training entities, monitoring training results, and financial tracking.

Examples of more specific issues (and in some cases their resolution) include:

planning:

- discussion of the Training plan for PVOs and the contents of the PVO training program, such as the development of environmental programs

Other rounds would be held in the appropriate place for that type of training. The responsible unit would be advised on the round program before its implementation with sufficient time to select the trainees and to print the training materials.

- the planning department and the village development department will advise the DCA on any training rounds implemented in other places according to LDII to ensure no duplication of training rounds. The round costs are also discussed.

Implementation:

- Low attendance of trainees -- one GTC decided to send the training and equipment to the workers sites to facilitate their attendance.

-Instructors' inefficiency -- trainees complained that they could not understand the instructors. The GTC replaced them with more competent ones. Village Council says that it wants tailored courses for the village population. And they wanted additional courses. GTC set guidelines for the GTD to adjust the courses accordingly.

- A GTC set the appropriate criteria for supporting the popular participation in project implementation

- Another set the training rounds for the coming month. This GTC meets once a month or upon demand of the DOA manager to discuss the training rounds

- regarding the scheduling of training, it sometimes happens that some training entities are preoccupied with scheduling their own training activities, and this may conflict with TBG activities. Hence the GTC decided to increase communication between it and the training entities to resolve the scheduling difficulties.

Funding:

- a GTC set the necessary plans for expenditures and maintenance
- discussion in another focussed on financial tracking, and it was decided that the TBG fund is allocated only for training. No other activities will be financed by TBG. In other cases, discussion focussed on the rules of TBG expenditures and incentives so as to regulate grant funding

- discussion centered on the possibility of financing training rounds from other resources and how to provide needed instructors and lecturers.

Table 4 summarizes key decisions which the GTCs make, and other units which make related decisions involved in the training process.

TABLE 4
GTC Decision Table

	Decisions	MLA				GOVERNORATE		
		U L D C	P L D C	P V O C	T S U B C O M	G L D C	G T	S E C G E N
1	approve the T.needs Assessment						X	
2	" the T. programs						X	
3	" the Target groups						X	
4	selection of T.providers/ Locations						X	
5	" " Trainers						X	
6	approve comprehensive T plan/ costs					X	X	
7	approve T plans review				X			
8	Final approval on T. plans	X	X	X				
9	approve T. round conducting							X
10	approve Temporary credits							X
11	T. problems solving decisions						X	
12	Corrective actions						X	
13	aprove QPRs						X	
14	approve surplus uses/rep repetitive programs/rounds					X		
15	approve surplus use new programs			X				
16	Final approval surplus uses	X	X	X				

2.1.3 Feedback: The GTCs receive both written and oral reports regarding training implementation. They receive from the training manager (ORDEV manager) training round reports, reports on trainee attendance, instructor performance, and evaluations of both trainers and trainees. In addition, they also receive financial information on the training rounds. The training manager also presents orally at GTC meetings planning, implementation and financial information as well as concerns or problems that may arise as part of these activities. All the GTCs have issued three or four QPRs to date.

2.2 Training Course Development

Training course development will be assessed in terms of needs assessment, course design, and course implementation.

2.2.1 Needs Assessment

The first general statement that can be made about training needs assessment is that there are a **variety of approaches** to identifying these needs at the Governorate level. For example:

◆ In Qina, each Manager in the Directorates, on the basis of personal experience and work needs of the Directorates, submits a training needs assessment statement -- objectives, courses, training entities, and number of trainees -- to the Village Development Department (VDD). The VDD assembles and sets priorities based upon these statements as to what training programs will be offered.

◆ In Dakahliya, the Local Councils define their training needs on the basis of LD project needs, Social Affairs needs and popular activities needs. They present their needs statements to the Districts which in turn sends them to the public service directorates. Each service directorate reviews the needs statements, prepares sectoral plans and presents them to the VDD. Criteria for training needs are based upon the status of: O&M, social activities, income generation projects and local popular council activities. The VDD in turn reviews the sectoral plans and present them to the GTC which after review, passes them on to the GLDC. The GLDC reviews and authorizes them, and sends them to the TA contractor who also reviews the plans and discusses them with the GLDC, GTC, and VDD if needed. Finally, the TA contractor sends the plans to the MLA Training Subcommittee for authorization.

◆ In Qalubiya, the training manager in each service Directorate defines the training needs of his Directorate. The criteria used is the actual need for training from the that managers' point of view.

♦ In Sharkia, every technical directorate conducts its own needs assessment. The training manager for the Governorate DOA is the training manager for the GTC. He encourages the directorates to review job descriptions, employer appraisal reports, rounds questionnaires, and rounds inspections reports to identify the needs. He submits a training needs statement to the GTC which sets program priorities based upon LD II and food production projects, and the more successful training courses.

♦ In Gharbia, the ORDEV training manager works directly under the Governor and the GTC. The ORDEV manager conducts the needs assessments. He visits all units of the Governorates which implement LD II projects. He reviews job descriptions, performance appraisals, and personal training records. In addition, he talks to job supervisors and some employees. The assessment forms he uses were designed by him with assistance from DAC consultants. The needs are then presented to the GTC for approval. The GTC criteria for selecting training programs are: LD II project needs; technical department needs, and PVO needs.

♦ In Cairo, the Social Affairs administrators take the lead in identifying training needs. However, there is no formal needs assessment, and the PVO Board members articulated their requests. These were passed on to the DOA training manager and to the GTC. The Waste Water Board also is active in identifying training needs, and its training manager keeps personnel records which identify what training each employee has received. This is used to make judgments on how training will be required. The training manager also estimates turnover and new hires as part of a needs assessment process.

Based upon this evidence, a second general statement is that training needs assessment in the Governorates is **not performed systematically**. There is no workable definition of needs assessment in LD II, TBG, TA contractor documents or in the USAID PIL #14. The Assessment Team found little or no evidence that anyone in the Governorates had been trained in the concept of needs assessment, its development, and its use as it relates to an MIS.

This is not to say that some common sense procedures are being applied; or that the Governorates do not understand that TBG funds should be spent on LD II projects. It is to say that there is no system of commonly accepted practices for conducting a needs assessment; and that there is no indication that an effective system is being developed. As indicated in the review of the Training Needs Assessment manual, high level decisions on the scope of training needs should be made before the TA contractors and the Governorates proceed to improve their assessment procedures.

2.2.2 Training Course Design

There are **different approaches** to designing and developing courses in the GTCs in the six Governorates:

♦ In Cairo, courses are designed in the training units of the directorates. In Social Affairs, the courses are designed by the training units of the PVOs with assistance from the SA training unit. Within the Waste Water Board courses are designed by the training department. The course plans are impressive with course activities planned by the hour and utilizing a variety of training approaches and locations.

♦ In Dakahliya, technical courses are designed by the Behira Technical Institute, the Central Department for Training and the Social Service Directorates. Managerial courses are designed by the CAOAs.

♦ In Qina, administrative courses are designed according to CAOAs standards. Technical courses are designed according to the manufacturers' catalogues (e.g. International Harvester, John Deere, etc.) and Chemonics training guides. PVO courses are designed by PVO employees according to their needs.

♦ In Gharbia, courses are designed by the technical departments in collaboration with the GTC training manager. Methods used are: to review the same or similar courses offered previously; to consult professional personnel at universities; and to use the GTD procedures for developing new courses.

♦ In Sharkiya, the training departments of the technical directorates follow the same methods as those used in Gharbia.

♦ In Qalubiya, the CAOAs design the managerial and O&M courses, and the technical directorates design the technical courses based upon previously offered courses.

While these differences in course design exist, the GTCs are designing and developing training courses **adequately**. There was no evidence that the Governorates suffered from serious deficiencies in course design and development. Limited interviews with instructors and trainees, as well as classroom observation (Annex C) indicated that the trainees were satisfied for the most part with the courses. Some of the training rounds examined indicated thoughtful use of training content. In addition, all Governorates keep previously offered courses on file, and they refer to them when designing new courses.

The use of course design manuals was uneven. In some cases none exist. In others, those developed by the CAO, Chemonics, Wilbur Smith, and the manufacturers exist and are used. In Governorates where the DOA is the main implementor of training for the GTC, courses tended to rely more on CAO materials. In addition, the design process could benefit from pedagogical training for course designers, especially at the directorate level where most of the course design takes place. It could also benefit from exposure to different instructional methods in the classroom because existing methods were mostly lecture.

2.2.3 Training Course Implementation

Three types of training courses are implemented: administrative/managerial -- much of which are O&M courses; technical courses; and social or PVO courses. While there is variation, respective agencies from these training areas implement these courses: CAO and university professors conduct administrative courses; managers and experienced individuals within technical departments conduct courses in their respective technical fields; and Social Affairs or PVO personnel conduct the PVO courses. In some cases personnel outside these entities conduct training such as university personnel. In general, however, 70% of the trainers were GOE employees. In administrative training, university professors participate heavily. Trainers from the private sector were very few. The range of trainers who implement training courses is listed in Table 5.

TABLE 5.
TRAINERS' TYPES & NUMBER
FOR 6 GOVERNORATES

	TRAINERS' TYPES	Qi	D	S	G	Q	C
1	CAOA employees				2		17
2	Local university professors			21	10		24
3	MLA				2		1
4	Governorate H.Q. employees			1	8		2
5	OA directorate				1		10
6	Financial directorate				1		1
7	Cleaning & decorative directorates				1		1
8	ORDEV employees			1	3		
9	Housing directorate						69
10	Health directorate				1		
11	Manpower directorate						23
12	SA directorate				5		71
13	Local G. councils members			2	9		1
14	Private sector		-	1	-	-	20
15	Other governmental institut.						8
	TOTAL			26	32		288

Generally, these trainers provide courses that met the required training needs. However, in some cases, some of the needs were not met. These were in income generation projects (chicken and honey production) and in the training of trainers. Chemonics and Wilbur Smith training courses were not funded from TBG funds. The responses given for this were that the GTCs cannot receive TBG funds because it would be contrary to the MLA guidelines; or that these contractors are too expensive, and the GTCs cannot afford to pay their training fees.

In addition, GTD courses were coordinated with other courses financed through other funding sources; most of these courses were in the administrative area. Edusystems was not used in any of the Governorates. There were no DAC manuals in TBG needs assessment, planning, and monitoring and evaluation available or used in the respective Governorates.

The training courses themselves are implemented in a straight forward, if not rudimentary, manner. Annex B describes some details of two training sessions which were observed. Emphasis is upon information and skill transfer. In these cases some of the trainees were illiterate, and so the level of training focussed upon basic knowledge and skills. However, traditional methods of "chalk talk" and rote learning were used. Perhaps, given the limited capabilities of some of the trainees, the sparse conditions of the training sites, and the limited time available for training (three to six days per training course), this approach is the most appropriate. It would be encouraging, however, to see trainers use some innovative instructional techniques which enable the trainees to participate more in the learning process. On the job training (OJT) complements classroom learning, particularly for O&M courses in technical areas. Here emphasis is upon problem solving and the development of skills. It is unclear, however, how the classroom learning relates to the OJT sessions.

3. Completed Training.

Tables 6 (Training Program data) and 7a-f(Training Course data) indicate that a surprising amount of training has taken place in the sampled Governorates during the short time that the TBG has been in existence. Table 6 indicates that for the most part the actual number of training programs in the three areas (administrative, technical and PVO) equalled the planned number of programs. In some cases, the actual number exceeded the planned programs. Tables 7a-f indicate that in all Governorates the number of trainees who completed training exceeds 1000, and in some cases exceeds this number considerably. While the data is currently incomplete, the ratio of male to female trainees is roughly 80:20.

TABLE 6
TRAINING PROGRAMS/ROUNDS IMPLEMENTATION STATUS
(P=Planned Programs; A=Actual Programs)

Programs

Courses Type	Qina			Dakahliya			Gharbiya			Sharkiah			Qalubiya			Cairo			Final
	P	A	%	P	A	%	P	A	%	P	A	%	P	A	%	P	A	%	
Administrative	10	10	100	6	5	83	7	7	100	10	10	100	11	5	45	7	7	100	88
Technical *	7	5	71	10	8	80	4	3	75	8	8	100	3	3	100	30	25	83	85
PVO	4	4	100	7	7	100	3	3	100	9	9	100	5	4	80	6	6	100	98
Total	21	29	138	23	20	87	14	13	93	27	27	100	19	12	63	43	38	88	90.3

* The difference is due to selling the income generator projects to private sector

Rounds

Courses Type	Qina			Dakahliya			Gahrbiya			Sharkiah			Qalubiya			Cairo			Final
	P	A	%	P	A	%	P	A	%	P	A	%	P	A	%	P	A	%	
Administrative	43	48	100	29	25	84	28	36	132	31	40	124	55	51	96	19	15	79	96
Technical	20	18	90	23	13	57	21	22	104	17	20	117	19	38	200	36	43	119	114
PVO	11	13	118	10	10	100	17	21	123	29	29	100	13	11	84	16	13	81	101
Total	74	79	62	62	55	89	66	79	119	77	89	115	87	100	115	71	71	100	103

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TABLE 7a TRAINING COURSE DATA

CAIRO

TYPE OF COURSES	NO OF ROUNDS	NO OF HOURS	TRAINEES			L.E. COST							
			M	F	TTL	TRAINERS	TRAINEE	TRANS.	STATIONARY	SUPER-VISION	OTHERS	TTL	%
Administrative (Local Develop.)	15	784	195	204	399	9302	10294	-	179.55	2640	397.10	22812.65	27
Technical	143	1896	496	119	615	18721.75	13802	-	296.45	6150	609	39579.20	48
PVO	13	520	422	113	535	5704	10700	-	776.65	2600	535	20315.65	25
TOTAL %	171	3200	1113 71%	436 29%	1549 100%	33727.75 41%	34796 42%	- -	1252.65 2%	11390 13%	1541 2%	82707.50 100%	100 %

TABLE 7b. TRAINING COURSE DATA

SHARKIA

TYPE OF COURSES	NO OF ROUNDS	NO OF HOURS	TRAINEES			L.E. COST							
			M	F	TTL	TRAINERS	TRAINEE	TRANS.	STATIONARY	SUPER-VISION	OTHERS	TTL	%
Administrative (local Develop.)	30	1122	599	25	624	13100	9250	11145	-	2450	7678	43623	42
Technical	30	1224	596	1	597	14963	4192	12040	-	2250	6904	40349	38
PVO	29	696	377	279	656	6124	-	7094	-	2175	5527	20920	20
TOTAL %	89	3042	1572 84%	305 16%	1877 100%	34187 33%	13442 13%	30279 29%	-	6875 6%	20109 19%	104892 100%	100 %

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TABLE 7c. TRAINING COURSE DATA
GHARBIA

TYPE OF COURSES	NO OF ROUNDS	NO OF HOURS	TRAINEES			L.E. COST							
			M	F	TTL	TRAINERS	TRAINEE	TRANS.	STATIONARY	SUPER-VISION	OTHERS	TOTAL	%
Administrative (local Develop.)	36	1002	1112	34	1146	18946.75	25870.-	565.-	4821.85	3370.-	1767.-	55343.60	53
Technical	22	900	453	1	454	8723.75	14995.-	337.50	2664.85	1630.-	1100.-	29451.10	28
PVO	21	540	227	254	481	4641.40	9745.-	-	2543.85	2100.-	1050.-	20080.25	19
TOTAL %	79	2442	1792 86%	172 14%	2081 100%	32311.9 30%	50610.0 48%	902.50 1%	10030.55 10%	7100.- 7%	3917.- 4%	104874.95 100%	100 %

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TABLE 7d. TRAINING COURSE DATA

QENA

TYPE OF COURSES	NO OF ROUNDS	NO OF HOURS	TRAINEES			L.E. COST							
			H	F	TTL	TRAINERS	TRAINEES	TRANS.	STAT.	SUPER-VISION	OTHERS	TOTAL	%
Administrative (local Develop.)	48		1261	-	1261	13187	28473	3816	3122	6561	2347	57506	65
Technical	20		405	-	405	4741	9250	-	677	1360	903	16931	19
PVO	13		215	119	334	2619	8900	-	630	1040	655	13844	16
TOTAL %	81		1025 89%	119 11%	2000 100%	20547 23%	46623 53%	3816 4%	4429 5%	8961 10%	3925 5%	88281 100%	100 %

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TABLE 7e. TRAINING COURSE DATA

DAKAHLIYA

TYPE OF COURSES	NO OF ROUNDS	NO OF HOURS	TRAINEES			L.E. COST							
			M	F	TTL	TRAINERS	TRAINEE	TRANS.	STATIONARY	SUPER-VISION	OTHERS	TOTAL	%
Administrative (local Develop.)	25		675	23	698	8922	16612	-		580	920	27034	
Technical	13		287	-	287	10408	10408	-		416	122	29774	
PVO	10		215	111	326	2832	2832	-		240	459	11283	
TOTAL %			1177	134	1311	22162	43192	-	2325	1236	1501	70416	

TABLE 7f. TRAINING COURSE DATA

QALUBIYA

TYPE OF COURSES	NO OF ROUNDS	NO OF HOURS	TRAINEES			L.E. COST							
			M	F	TTL	TRAINERS	TRAINEE INC.	TRANSP.	STATIONARY	SUPER-VISION	OTHERS	TOTAL	%
Administrative (local Develop.)	51		1360	87	1447	15,902	23,801	-	-	2058	7248	49017	
Technical	38		453	5	458	10,508	14,654	-	-	3420	5167	33749	
PVO	11		10	257	327	4,986	10,903	-	-	1442	2323	19654	
TOTAL %	100		1883	349	2232	31,396	49,367	-	-	6920	14738	102420	

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4. Funding of Training

Tables 7a-f, and table 8 summarize key elements in the funding of training. The most encouraging fact is that with the exception of Dakahliya, the Governorates spent most of the LE 105,000 which was allocated to them for one training year. This is remarkable given that they received only LE 10,000 per year from the central government before the existence of TBG. Clearly, there is a readiness and willingness to utilize training funds; and from the above findings, it appears that this utilization was relatively effective. This capacity to spend the funds indicates that the Governorates were capable of determining training needs (albeit unsystematically); were designing training courses; were utilizing local training resources such as trainers and training sites; and were enabling the trainees to be absent from the work place to attend training courses. In addition, Tables 6a-f indicate that most of the funding was for the trainers and trainees, while only a small per centage was for additional needs.

5. Effectiveness and Future of the GTC

It can be said that over all the GTCs manage training operations and develop courses satisfactorily so that they implement training effectively. Responses from personnel in the six Governorates about GTC effectiveness were positive. In some cases, these responses came from the Governor himself. Evidence indicates that the broad participation of GTC members is in line with the goal and intent of TBG.

However, when AID funding for TBG terminates, the future of the GTC is uncertain. In most cases, the response to this issue was that the GTC will continue to function, but will manage a reduced TBG program. Nevertheless, the training will continue. In a few cases, it was suggested that the whole training effort, now implemented by TBG, should be taken over by the Governor himself. That is, those Governors who endorse training, are willing to have a training department established under their direct supervision. This seems to be a likely alternative to continue the training functions which TBG now fulfills, and which the GTC manages effectively.

Table 9 summarizes all the activities which the TBG program currently initiates.

TABLE 8
TBG Financial status for cycle
(6 governorates)

Governorate	Expenditure	Balance	Remarks
<u>cycle 1a</u> Cairo	82,708	22,292	programs are still under implementation
Qalubia	102,490	2,580	
<u>cycle 1b</u> Gharbiya	104,895	,105	programs are still under implementation
Qena	88,261	16,739	
Sharkiya	104,892	108	
<u>cycle 1c</u> Dakahliya	73,158	31,842	
Total	556,334	73,666	

TABLE 9

TBG ACTIVITY SYSTEM

	INPUTS:	PROCESSING:	OUTCOMES:
USAID	TBG FUNDS	->	T-plans
USAID	TBG TIA Contractors	-> T. needs assessment	-> T.programs
USAID	CHEMONICS T.Programs	-> T.programs design	-> Trainees/administrative
USAID	WSL T.Programs	-> T.programs priorities (criteria)	-> Trainees/T.specialist
USAID	CHEMONICS MIS	-> T.sectorial planning	-> Trainees/Technical
USAID	PIL #14	-> Comprehensive T.plan preparation	-> Trainees/PVO
		-> T.providers contracting	-> Trainees/L gov.
CAOA	administrative T.programs	-> Trainers selection	-> Trainers/
CAOA	Training specialist	-> T.facilities equipping	-> T.programs Library
CAOA	instructors	-> T.programs implementation	-> TBG accounting records
SADAT ACADEMY	administrative T.programs	-> T.rounds conducting	-> T.programs Tracking
NOWW	Technical T.programs	-> T.supervision	-> Financial Tracking
NOWW	Training provider	-> T.programs' evaluation	-> T.MIS
BENHA TI	Technical T.programs	-> T.plan updating	-> T.activities decentralization
BENHA TI	Training provider	-> financial surplus utilizer	-> T.activities institutionalization
ENVIRONMENTAL INSTITUTE	Technical T.programs	->	TBG Manuals
ENVIRONMENTAL INSTITUTE	T.provider	->	QPRS
UNIVERSITY FACILITIES	Local government programs	->	TBG policies
	Lecturers	->	T.Capabilities
	Technical T.programs	->	T.rounds' reports
	T.Centers	->	T.evaluation reports
HOUSING DIRECT.	Technical T. programs	->	
HOUSING DIRECT.	T.laboratories	->	
HEALTH DIRECT.	Technical T.programs	->	
HEALTH DIRECT.	T.centers	->	
ROADS DIRECT.	PVO T.programs	->	
	Kindergarten	->	
SA DIRECTORATE	girls workshups	->	
	youth clubs	->	
	Nursery T.programs	->	
AMBULANCE	PVO instructors	->	

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A N N E X B

ASSESSMENT OF THE TRAINING MANUALS

B.1 TBG Follow up and Monitoring Scheme Manual

Introduction

In its present state of development, this document is not really a **Manual**, and is not assessed as such. However some comments will be made relative to additions that would be appropriate for the development of a manual.

Further, the scheme needs to be assessed in the management contract of the other elements of training, i.e., needs assessment, design and development of courses, and presentation of courses. For example, on form (1) trainee registration form, there are spaces provided for program titles of courses attended during the past three years. Unless the course title content and instructor are well known to many people, that title will not be very useful to a new instructor or supervisor in ascertaining what skills or knowledge the trainee might be expected to have when enrolling in the new course.

Most training programs sponsored by the World Bank, ILO, or USAID are required to be competency based. The development procedure is essentially the same in coordinating the relationship between the content and the competency-based outcomes. This facilitates monitoring and follow-up. The required competencies or outcomes are predetermined and a method of testing is designed. The course design is built around learning that content, and the student is tested accordingly. These principles for developing a monitoring and follow up system are not found in this document. Therefore it is difficult to critique this document.

On the positive side, it was found in this Manual that the forms and process in its present state of development were comprehensive and suitable for field conditions. Some of the following comments may be critical, but they are intended to assist further development of the manual.

If the reader of this assessment had the manual available for reference, the following points would be clearer.

Critique

1. **Filling out Forms** - It would be wise to print somewhere on each form (or attached instruction sheet) **who** is to complete the form; **when** the form is to be given; and **who** receives it. This information is provided in the scheme introduction, but it is practical to repeat it (in smaller print) on the form itself.

2. Trainee Follow up for Personnel Career Development - Form (1) is the only form with trainee information on it, and for purposes of instructor information it seems quite inclusive. However, from the follow up system format it appears that it will be buried with the rounds information and will not serve a useful continuing purpose. For example, a more complete form is the Wastewater Board Personnel Department in Cairo. It has a seemingly thorough system of entering training results into personnel records, and using that information relative to further training. Those who develop a follow up system might wish to look at those Cairo forms for guidance.

3. Trainer Specifics Form (2)

The scheme provides no information about this form, except that it is to be filled out by the trainer. It appears that its use is to help a supervisor determine the qualifications of the trainer to teach a round of a program. Unless the program and the trainer are already well known and in place, this form does not provide sufficient information for supervisor decision making. The form identifies "Training Assignments during this program" with three topics, methodology and dates after it. (Does this mean that this form only deals with programs that have three meetings? If so, how long are the meetings?)

One would like to know something about the objectives of the course, and how the trainer plans to meet those objectives. "Training aids used" is not useful information unless it is known how they will be used. For example, none of the following have distinct advantages -- the use of a black slate chalkboard, a white chalkboard with dry eraser markers, or an overhead projector -- if they are all used by the instructor who simply lectures to his trainees. However, if the instructor uses prepared transparencies with line drawings and overlays to illustrate with examples his discussion with the trainees, his effectiveness will increase. In brief, this form is lacking in providing significant information about what the instructor plans to teach or how he plans to go about it.

4. Trainee Opinion of the Courses (3.1)

If this form is to have broad utilization, some attention should be given to the level of language. Unless clearly defined and used appropriately, the words such as "subject, concepts, principles, scope, training methods insufficiency, positive and negative aspects" are not apt to produce accurate responses to the questions being asked. The questionnaire appears quite good, but the wording should be more precise.

5. Trainers' Feedback and Evaluation (3.2)

When identifying the trainers' background, the form asks for the academic degree, and the date or year of the academic degree. If this is important information, it should have been included on the trainer specific form (above) and not repeated here.

Topics and responsibilities assigned are not defined anywhere and should be if there is to be common understanding among instructors as to what they mean.

Item (4) at the bottom of the form changes subject from "you" to "the instructor or trainer". This wording should be consistent. Item (5) refers to "your training assignment" as do topics and responsibilities "under general information on the preceding page." There is a train of thought here which suggests that this form is intended for instructors who teach only part of the course. However, this point is not clear.

There is no form for instructors who teach the whole course. Perhaps one form is needed for the "core" instructor who delivers most of the training, and another for "guest" instructors who contribute parts to it.

Items 7-10 represent items that should be retained if there is to be integrity of presenting future rounds. If they are not filed with the rounds report, where will they be stored? They should not be separated, and should be filed with the rounds report.

6. Quarterly Reports

The Quarterly reports of the Governorates are comprehensive and cover most of the TBG requirements. Three additional dimensions which might be considered:

6.1 A proper training MIS will contain criteria for **needs assessment, planning, design, and implementation** of programs and courses, **presentation** of the courses, and **monitoring and follow up**. The purpose of the MIS is to collect, organize, calculate as needed, and present data and information to the training manager for use in decision making. The planning of the MIS requires information needed to specify the comparisons, summaries, listings and calculations that would be useful for management purposes.

The Quarterly progress reports forms (QPR) contain comprehensive information, but there is no feed back to needs assessment and course planning. For example:

♦ How much of the defined needs had been met and how much remains?

♦ If a program produced 35 trainees, it is interesting to know if it were planned for 150 trainees. In field visits, there has been a tendency of local staff to dismiss underspending of planned courses as "savings", but the underspending could also be associated with insufficient information for planning.

The above examples are cited as examples of the need to define how the follow up scheme flows back into the total MIS system.

6.2 The second dimension is related to the first and it deals with the matter of **who** is expected to review the information from the monitoring reports and **take action** on the information received. The team saw evidence of ORDEV training managers informally looking at the course survey information in the rounds reports and using it for instructor selection and informal needs assessment, but there are no specific suggestions in the system that this is done. Also it is not clear whether GTC and MLA receive the reports. Do they review them in terms of resource management and planning?

6.3 There is a question of the "cost per student instructional hour (CPSIH)". Data is presently collected on cost per round and cost per trainee. the CPSIH would not require more data collection, just an additional calculation of **costs of rounds = No. of students x hours in round.**

Training costs were described as follows: "Course A costs LE 50 per trainee, but it was because Course B was longer, so it does not matter." This is not clear, and so the information is not useful. CPSIH provides a more usable comparison. There will still be accountable differences between the cost of technical management courses and PVO management courses, but at least "like" courses can be compared.

B.2 Training Needs Assessment Manual

I. Introduction

The Training Needs Assessment Guide was provided by IDC as the last printed document of a training needs assessment manual now receiving input from pilot sites. The "Forward" section indicates the intent to produce four documents as follows:

1. Training Needs Assessment Studies
2. Training Programs Planning
3. Training Plans/Programs
4. Training Plan/Programs Assessment

II. Analysis of the Training Needs Assessment Reference Guide

The "Training Needs Assessment Reference Guide" (Guide) is contextually not a manual at this point, and so it is not assessed as such. However, comments are made which can be regarded as applicable to further development into a manual. Part II, "Introduction", No. 1, "Training and Human Development" contains statements of philosophy on learning which are interesting, but not of high value to the person starting out to do needs assessment for training. For example, one statement reads, "the human being learns all what he knows. This knowledge is not by all means innate."

Part II, no. 2, "Training Needs and Some Basic Principles in Training" contains some significant elements in needs assessment. This includes a simple definition:

"a needs assessment is the detection of whatever knowledge, skills, values or attitudes found to be lacking in a group of workers which if developed would ultimately lead to a better performance in respect of duties and responsibilities, with the least waste in effort, time and costs. An assessment study should have a number of strategies and objectives according to which an integrated plan can be devised and determined."

The "Guide" goes on to identify four training objectives:

- 1) To attain a conceptual unity among any group of workers in one field and within the organization where this group works.
- 2) To develop this professional character of trainees within three basic elements: (a) Functional knowledge (read, write, solve arithmetic problems, solve simple science problems, ie. gears, levers, etc) related to work; (b) skills, techniques,

technicalities related to specific jobs; (c) attitudes and values related to functions assigned in the work situation.

3) To promote and upgrade work methods compatible with work objectives and output.

4) To prepare and continue to update the cadres necessary for the discharge of work functions within the total work structure covered by the assessment.

Part II, No. 3, a-c discusses the concept and rationale for local development. No. 3, part C identifies training needs of LD II as defined by the "indispensable projects: of LD II as follows:

A. Basic Service projects

1. Potable water operations
2. Construction of roads
3. Bridges
4. Sewerage networks
5. Water containers
6. Road sweepers
7. Ferryboats
8. Street lights
9. Road Pavement
10. Fire Units
11. Connection of electrical current
12. Maintenance of schools and sanitary units
13. Tree planting
14. Equipment and vehicles for maintenance, cleanliness, and insecticides.

B. PVO program

1. Dispensary
2. Day Care centers
3. Youth Social Clubs
4. Women knitting workshops and training center
5. Vocational centers
6. Illiteracy classes

The Guide goes on to state that the LD II agreement "laid special emphasis on training to meet the requisite training needs of the above mentioned projects" and developed two training systems:

"First: Advanced training programs to produce high standards of training at various levels and specializations" (Chemonics and Wilbur Smith training of technicians on maintenance and operations)

"Second: Governorates' TBG activity targeted on training decentralization by developing and sustaining capabilities of concerned training authorities."

Part II. "Methods of Training Needs Assessment" discusses two general categories of needs assessment. The first category relates to a continuing need for fairly specific occupational study and is contained in three sub-categories:

1. Job description analysis
2. Conditions and/or status of job occupants

The second category of needs assessment is more global in character and is discussed only very briefly. This suggests that heads of service directorates and general authorities and DOA researchers ought to:

1. Study and provide information about each organizational chart for governmental or general organizations with reference to accountability, number and sex of manpower, lines of authority, channels of communication, and pattern of coordination.
2. Examine and study the applicable work regulations and procedures of duties and an analysis of the comprehension of these rules and systems by the job occupants.

This second category of more global needs assessment is not discussed further in the Guide.

Part IV, the "Appendices" of the Guide contain the Job Description form, the Job Occupants form, and the Supervisory Opinions form. (It would be useful for the reader of this assessment to have the Guide available as reference.)

1. **Filling out the Forms.** The forms do not contain any directions as to how they should be completed, by whom, when the form is to be completed, to whom it is to be given after completion, and who retains it after initial usage. This should either be printed on the form or be in specific separate directions for each form.

2. **Suitability of forms for users.** It is nearly impossible to design one job description form that is appropriate for use of the following: executive, technical, mechanical, and labor positions. Clearly, there are different work demands, objectives and required skills for each job category. The four categories should be discrete. The structure of the questionnaire should reflect these four different categories.

3. Focus on job description form (F.1) as the basis of job needs study. In attempting to determine training needs for a specific job, a needs assessment specialist should be able to focus on one document, rather than three. Thus information collected from job occupants and supervisors about a specific job should be presented on the job description for inclusion in the assessment.

Descriptions and responsibilities will vary according to type and level of occupation but should be as specific as possible. For example:

- ♦ measure simple transistor circuit characteristics
- ♦ use crank mechanisms to change direction and speed in simple machines
- ♦ use accepted trouble shooting procedures on hydraulic systems

Form (Form 1, p.3) appears to be a summary form to collect the information from the various job occupant forms. Hence the information to be contained here is the quality status of the Job Occupants (Form 2) which is discussed in the next section.

4. Job Occupants Form (2). This form needs to consider the recommendation above about specifying four discrete levels of job descriptions. In addition:

4.1 On page 2 of Form 2, items 4 and 5 relate to education. Item 5 asks for date of graduation and main specialization but does not specify which level is being addressed. Further, items 21, 22, 23 on pages 5-6 on this form all deal with education and training and should be folded in with Item 4.

4.2 Item 6, "Work Organization" should specify that this means the present job.

4.3 Title and degree of job. Before this question is attempted by job occupants, it is necessary to assure that the jobs in the organization have names known to the occupants. (Frequently, the jobs are personalized as "Abdul's job", etc). Also if there is a degree or educational level requirement for the job, such information should already be in the job description, and not required to be asked here.

4.4 Item 12 should indicate this refers to jobs before the present job.

4.5 Items 13-20 deal with items that are not collected on the job description occupants summary form and are only incidentally related to the occupation. There is not really a reason to collect this information for job description purposes.

4.6 Items 24-27 asks the occupant to describe the training he or she needs in terms of programs, rounds, methods and training aids. This is difficult for the occupant to answer. Rather, the occupant should be asked about the areas of his work in which he or she would feel more comfortable and competent if given training.

4.7 Supervisory Opinion form (3). As indicated earlier, a training needs assessment specialist should have one primary source document of information about the requirements of a particular position. The information on the job description typically comes from previous job descriptions, supervisors observations about the occupant, experience and qualifications. Much of the occupant form (F2) is included in the summary of the job description for the occupants. There is very little in Form 3 (pp.1-6) which deals with the supervisor's expert opinion about the validity of the items in the job description. This is essential for the supervisory process, and should have a form developed for that purpose. It also enables the training needs specialist to utilize the analysis as part of the assessment.

The F-3 Form is more a "stand alone" form which training planners can ask supervisors to complete. It is one of the common approaches to needs assessment presently being used in the Directorates. The DOA training manager simply asks the unit supervisors what they feel their training needs are.

Pages 1-2 of Form 3 are qualifying statements about the supervisor including his or her "span of control" over the employees. Page 3 responds to the question -- which are the most important categories of employees' needs to be served? However, instructions for setting priorities are vague. There is no information provided as to criteria or methods that might be utilized to develop the priorities. Nor is any direction provided about how to prioritize specific descriptions within the categories.

4.8 Forms 4F3 and 5F3 permit the supervisor to specify the training he or she needs for the job description. This includes information on specialization, numbers to be trained, training periods, training programs, training institutions, and training providers. All of this is done without reference to priorities or needs assessment.

III. Discussion on Training Needs Assessment As It Relates to TBG and LD II.

There is a fundamental concept in training needs assessment which can be summarized by this formula: training experience x work environment = desired results.

Within this concept if a training program is well designed and skillfully delivered, and the trainees learn what is intended, and the "training experience" side of the results formula is 100%. However, if a supportive work environment is not present, i.e., a supervisor who holds people accountable for using their new skills, and continues to coach them, or there is a lack of required job tools, or there are impossible physical or emotional working conditions, then the work environment is less than satisfactory. Thus training must consider carefully both the implementation of the training program (experience) and the work environment. For example a client in a high tech corporation was concerned because people who produce disk drivers were not following the procedures that were clearly defined in manuals and taught in training programs. The client was willing to buy a training program for the entire unit, but was willing to look at a "problem cause analysis" first.

"Problem cause analysis" indicated that the primary reason operators were not performing as desired was because there was a lack of tools. Tools required by operators were often misplaced or not available. When the correct tools were not available, the operators (under production time standards) used whatever tools or tinkering they needed to get the job done. This often resulted in short cutting procedures, as well as creating problems for other people down the line.

The client bought \$3,000 worth of tools and a simple procedure for making sure the tools were always "on hand". Not a single day of training was conducted and the problem disappeared.

In another work environment illustration, the international banking client desired to increase sales of additional services by providing cross-training of bank tellers to sell bank services to customers who come to their teller windows. The training program was very successful as evidenced by the teller participants. This showed their new skills in video-taped simulations. However, when the tellers attempted to use their new skills on the job, services to depositors slowed, and customer lines started to form. Depositing customers complained. After all, if a teller not only handles a transaction but actively engages a customer about additional services, the time per transfer increases exponentially.

Branch managers, largely unaware of the special teller cross-training chastised their tellers to speed up supervising customers. The cross-selling of services disappeared. The work environment at the bank did not support the training program experience.

What these examples demonstrate for Egypt are that skillful training needs assessment should focus primarily on defining training needs that will lead to training programs having impact on the LD II initiative.

At present, the limited manual MIS system focuses on training-for-activity (i.e., number of training programs, number of rounds, number of trainees, number of instructors, cost per round, cost per trainee, etc). This is not apt to change unless the training needs assessment on a more closely defined by LD II training needs.

This does not mean that activity-based training has no value. First, it is probable that all of the training is going to have some favorable impact of work performed, even if some of it does not. Second, it is likely to have some favorable impact on trainee attitude because being chosen for training tells the employees they are valuable enough to be trained and that their work is important enough to train for. The objectives of training-for-impact in Egypt is to build on some of the favorable circumstances which may already be present in training programs in order to make the training more effective in terms of LD II objectives.

B. 3 GUIDELINES FOR GOVERNORATES ASSESSMENTS (CYCLES 1A AND 1B) MANUAL

Since the "Guidelines" had already been utilized, two questions guided the assessment: (1) were the "Guidelines" followed, and were reports developed which would be reflective of the "Guidelines'" intent? and (2) was the information collected appropriate for assessment of the TBG courses?

1) Use of the "Guidelines"

The Governorate reports were written in Arabic and were examined at Gharbiya and Sharkiya by the Assessment team. The Gharbiya report was prepared by the ORDEV training manager was complete according to the outlines and directions provided in the "Guidelines". The statistical tables were carefully prepared, and these included charts and diagrams to clarify the analysis. Open-ended questions, including the role of GTC members were addressed. The participation of the GTC members was documented with minutes of the meetings.

Other open-ended areas were addressed including the Issue of Training Regulations and Bylaws, Planning, Follow up and Monitoring systems, Financial Tracking procedures, training entities, the utilization of PVO training, criteria for selecting training entities and for estimating costs, problems and constraints, lessons learned, and recommendations for the 2nd Cycle.

The Governorate Assessment in Sharkiya was also examined. It was less extensive than the one in Gharbiya, but it was essentially in compliance with the Guidelines.

2) Use of the Information

The content of the "Guidelines" covers the significant intent of TBG as it relates to LD II. One exception is that there are no direct questions in the "Guidelines" which address the strengthening of training capabilities. Hence, no information regarding capacity building is being according to the "Guidelines". This is egregious as capacity building is a primary objective of TBG. Most likely capacity building is taking place as the GTCs have been established and are operating; there are bylaws and regulations; and planning, monitoring and follow up occur. However, it would be useful to obtain additional information and opinions on these issues because they are vital to the sustainability of TBG in the Governorates.

B.4 PLANNING SYSTEM MANUAL as described in the "UPDATED POLICY GUIDELINES AND MANAGEMENT SYSTEMS (Sept 30, 1990)

The "Planning System is comprised of five parts:

1. TBG classification of training areas
2. Proposed training priorities
3. Proposed criteria for designing training programs
4. Training program plan format
5. Training plan sheet summary format

The following comments relate to pages 1-10 in the "Arbitrary Classification of Training Areas" on p. 1, and to the "Proposed List of Training Priorities on p. 2. These sections appear to be consistent with the goal, purpose and objectives of TBG and LD II.

On p.3, "Proposed criteria", item 1 states "the program plan should be designed and based on assessment studies of training needs and local training potentialities". This is an important criterion, but this document does not contain any guidance on how the training needs assessment "flows" into a training plan. Without this basic ingredient in the planning process, that process takes on more of an intuitive approach as to what programs to offer.

P. 4-10 provides an appropriate format for planning the course. It would be useful if a parallel instruction sheet could be developed which could provide some examples, i.e., Program Training Objectives, Main Topics, etc. in order to develop more consistence in the planning process.

The Planning Outline assumes that the planner using the form has some design knowledge. For example, on p. 5, item 5, the writing of "Program Training Objectives" requires both knowledge about how such objectives are written; and skills in the writing of these objectives. This requirement may be beyond the design knowledge and skill level of some of the TBG planners.

B.5 MIS USER'S MANUAL

Introduction

The "Introduction of the Users Manual (UM)" identifies that the program software was written utilizing a "Fox Box" system plus a (REEM) Arabization package.

Information on page 19 identifies the Hardware/Software configuration requirements as:

- IBM PC (or compatible)
- Hercules Monitor Display (Monochrome or color)
- A double disk drive and a hard disk
- EGA card
- The Arabization Package (REEM)
- TBG System Diskette
- Empty Diskette

"The actual programs are written in English. However, the retrieval or entry of data can be done in English or Arabic. Our system was designed especially for TBG systems of the LD II. Although the system design deals mostly with the registration and financial aspects concerning the TBG team, it remains useful for all of the team."

The modules available to the user are (page 8):

- Training plans
- Training Responses
- Training Plan's Program
- Actual Round Registration
- Output reports
- Exit

Copies of the "Screens" and File Design indicate places to enter, store, and retrieve identification information about: the Governorate, training places, training plans, training rounds (including activity information about course start and end, dates, number of trainees, etc.), program types, training types, training objectives, training mode training material and training budget. It appears that it is not

possible to compare actual round data against planning and to prepare summary documents for the QPRs.

The information included is schematic in character. There are no "produced" reports from actual field information from the system. There it is difficult to know what the final reports will look like.

Critique

1. As a computer program, this document appears to be a reasonably competent and efficient effort to enter and process the information for the QPRs now being used in the manual MIS system. Without produced reports, however, it is difficult to say that the system will actually operate on the recommended software and hardware; and what the printed reports will look like.

2. There was no indication in the Governorates' reports whether the Governorates would use existing hardware and software, or whether they would have to acquire them. The Team has noted and been told that there are IBM PC's from other programs in the Governorates, but access is always an issue. Computers tend to be appropriated for specific uses, and there may not be the flexibility within the Governorate to allow multi-usage for each computer.

3. The document is written as a "users" manual, but it is weak in documentation. There is no indication as to who the user will be. While some data entry information is provided, it does presume some additional training for the data entry operator. If this person is presently situated in the Information Systems (I-S) Directorate of the Governorate, only a minimal amount of additional training may be needed. If the data entry clerk is in the training office with no prior experience, the effort would be greater.

4. Other documentation weaknesses include the lack of the following:

- information for supervising review
- emergency instructions
- systems flowcharts
- program flowcharts
- test data
- sample input and output documents
- control procedures and who should perform them
- description of user accuracy check

5. Shortcomings described in the Assessment of the Monitoring and

Follow Up Manual are relevant here. These are:

- there is no feedback for needs assessment and course planning
- there is no indication who is expected to review the information from the reports and take action on the information received
- more definitive information on cost is needed, such as cost per trainee per day
- the system does not track the training records of individual trainees.

ANNEX C

TRAINING CENTER VISITS

In the six sampled Governorates, only Qina had training courses that were taking place at the time of the Assessment Team's visits to the Governorates. Only two training courses were observed. Nevertheless, these observations -- as a purposive sample -- provide useful insights into the training process as it took place.

1. O&M Training for Road Equipment

There were 15 trainees for the course of 6 days, and 8 hours per day. Thus, the total training time was 48 hours. The theoretical discussion took place in a classroom as part of the office complex of the equipment department. There were 3 trainers. The type of trainees included technical supervisors, garage managers, equipment drivers, electricians and mechanics. Several trainees were questioned as to the nature of the course, and they responded that the course content was relevant to their needs. Classroom training takes place for 2 days, and OJT takes place for 4 days. The design of the course is by the engineers and technicians in the department itself, and they received their catalogues illustrating the operations of the engines from the manufacturers (e.g., International Harvester, John Deere, etc.). There are no printed materials for the trainees, and the class presentation was lecture with blackboard illustrations. When questioned, the trainees said that the duration of the course was not sufficient; they wanted to have more class time and OJT. The trainers said that this was not possible, because an extended training time would interfere with their work time. The course round is repeated so that all the targeted trainees receive the training. The chief trainer was the engineer manager for the equipment station. He said that he evaluated the trainees during the course by how well each performs a specific task (e.g., setting the gap for the valve arm). He also follows up the trainees' performance because each trainee works in the department under his supervision.

Costs: LE 250 for instructors' fees; 450 for trainees' per diem; 50 for stationary and materials; and 80 for administrative and technical supervision. This is a total LE 830 for the course, and LE 9.2 per trainee day.

2. O&M Training for Water Motors

There were 31 trainees who attended the course for 3 days only at 7 hours per day. Three hours per day were devoted to theoretical lecture, and four hours were for OJT. The design of the course was done by an Assiut University professor, and the course was taught by a woman engineer who received her degree from Assiut University. She used the Chemonics books as instructor materials. The classroom was attached to the water equipment station, and was very crowded.

Classroom instruction was by lecture, and the trainees responded in single word answers to complete a statement made by the instructor about how an operation worked. Lecture is kept simple so as to adapt the delivery of the material to the varying educational backgrounds of the trainees. When nonliterate trainees were asked if they understood the lecture, they responded in the affirmative. Also, the trainees said that English terms were translated for them in class by the instructor. OJT in both training sites took place in an assigned workshop area. At the end of the round, there are two hours of discussion to assess the effectiveness of the round. The Secretary General from the Governorate attends these two hours to ask questions and to understand the training process better. Problem-solving is a main purpose in the training exercise.

Costs: LE 210 for the instructors' fees; 372 for the trainees' per diem; 72 for stationary and materials; and administrative and technical supervision is 80 for a total of LE 734. This comes to LE 7.9 per trainee day.

A N N E X D

ASSESSMENT QUESTIONNAIRE

The structure of this questionnaire is that the questions are arranged by TBG program component. The questions within each component are to address key issues regarding that component's structure and operations.

A. PLANNING PROCESS

(While this section is in the Workplan as a separate section, it was decided to incorporate the questions developed for this section into Section C - The Role of GTC in TBG.)

B. MLA Training Subcommittee's Role in TBG

1. What is the membership of the MLA Training Subcommittee?
2. What is the function of the Subcommittee?
3. When was the first meeting of the MLA, and how often does it meet?
4. What kinds of reports does MLA receive?
5. What did the Committee do in the past three years of TBG?
6. What does MLA do with reports coming from the Governorates regarding implementation progress?
7. Does MLA feed back information from these reports to the Governorates?
8. Does the MLA subcommittee send QPRs to the Technical Amana?
9. Was the MLA subcommittee effective in its work until now?
10. What will be the role of the Subcommittee in the future?

11. What kind of leadership will the MLA Subcommittee provide to the Governorates?

12. Will the MLA Subcommittee develop an MIS for the TBG system in the Governorates? If so, what will it look like?

C. The Role of GTC

1. What are the GTC members' names and what are their positions?

2. When was the first meeting under TBG and how often does the Committee meet?

3. How many training rounds were implemented?

4. How many persons were trained in total?

5. Of the persons trained, how many were females?

6. What were the total TBG funds disbursed to date?

Deposited

Withdrawn

Balance

7. What happens to the unused balance for each cycle?

8. What types of issues were discussed at these meetings.

9. Were regulations and bylaws covering these items developed?

10. What type of assistance was received from the MLA Committee?

11. What kind of information do you receive back in written or oral form regarding training?

12. What types of implementation issues has the committee resolved?

13. How many QPRs have been issued to date?
14. Which members and which components of the Committee are responsible for training planning and implementation?
15. How is training needs assessment done? Who does it?
16. Were there criteria for prioritization? What were they?
17. Who designs the training courses?
18. How? Describe manuals references and technical/professional assistance utilized.
19. Do courses remain on file for future use by the training committee?
20. Are there defined training needs but unmet?
21. What is the distribution of training?
22. Who are the trainers by type and number?
23. Have any of WSA or Chemonics training courses previously funded from GOE monies been funded from TBG funds? Can TBG assist to institutionalize Chemonics and WSA type courses under GTC?
24. Has the Governorate Used the Edusystems?

25. Have TBG funds been used to finance training courses under the LD II Activity?
26. Are GTD courses coordinated with other courses financed through other funding sources?
27. How effective were the DAC Manuals in TBG Needs assessment, planning, monitoring and evaluation?
28. How does GTC relate to GTD? How effective has this coordination been? How could it be improved? Does the GTC manage courses funded through sources other than TBG? (If yes, what areas?)
29. How effective has GTC been in this Governorate? How could it be improved?
30. When USAID funds stop for this project, how will GTC continue the planning process?
31. What will GTC look like in five years?

D. Monitoring and Follow up System

1. Who supervises the training courses?
2. How many times was each course supervised?
3. What supervisory techniques were used?
4. Were any measures developed to assess improvement in trainee competency?
5. Who collects and analyzes the feedback information for use in further training rounds? How is this done?

6. How many days in advance in the start of a training course are the trainees notified?

E. TBG Management Information System (MIS)

1. Do you have an MIS?
2. If so, please describe how it operates.
3. What are the main problems encountered with the MIS?

F. TBG Financial Tracking System

1. Describe the financial tracking system for TBG, including reports, financial statements and banking records.

G. TBG Funding increase

1. If this Governorate were required to increase its share of training costs to retain TBG funding, do you think it would be willing to do so?
2. What would you consider to be a reasonable local effort as part of total costs?
3. What alternatives to funding by the Governorate which would contribute to the TBG effort do you see possible, as for example labor, provision of services, private sector competition, taxes, etc.?

ANNEX E

Methodology

The methodology for the TBG assessment utilized field interviews and selected observation; and document review. A four person team utilized this methodology during an eight week period. The first step was to identify a research focus. The second was to conduct field data gathering. The third was to analyze the data. The final step was to write up the report.

1. Research Focus

1.1 The Statement of Work had eight areas which corresponded to the components of the TBG, and these formed the general focus for developing a methodology. These are: planning process; managing role of the MLA Training Subcommittee; coordinating role of the GTC; monitoring and follow up; MIS; financial tracking; funding increase; and honoraria payments.

1.2 The Assessment Team developed research questions for each of these components (See Section I - Purpose of TBG and the Team Assessment). These were general questions intended to guide the research for each component.

1.3 The Team next developed specific questions for each of the general questions

1.4 Using these questions, it then constructed a questionnaire.

1.5 The Team also supplemented this questionnaire construction with a document review. These consisted of AID documents (PIL #14, background papers, and correspondence) as well as contractor documents (progress reports, manuals, etc.)

2. Field Data Gathering

2.1 The Team identified six Governorates for field visits. These were Cairo, Qalubiya, Gharbiya, Sharkiya, Dakahliya and Qina. Key criteria such as the operations of a TBG program, economic base, population density, rural-urban position, and participation in the LD II project guided the selection of these Governorates.

2.2 The four person team broke into two units, each with two persons. Each unit visited three sites. Each site visit lasted three days.

2.3 At each site the Arabic speaking member of each team conducted interviews with key members of the Governorate who managed TBG. These were for the most part: the Governor, Secretary General, Planning Manager, ORDEV manager, DOA representative, Training Coordinator, accountant, and other relevant personnel. Interviews took place in a group, and the Arabic speaking Team member filled out

the questionnaire. In addition, he reviewed relevant documents (training round reports) and collected quantitative data on the number of trainees trained, costs, etc.

2.4 In a few cases the Team observed training courses in operation or inspected training centers.

3. Data Analysis

3.1 Upon completion of the data gathering, the Team analyzed responses to each question from each of the Six Governorates.

3.2 Based upon this analysis, it then synthesized the information for each component.

3.3 Quantitative data were also analyzed and synthesized into tables.

4. Report Writing

4.1 Each Team member took different components and wrote up the findings. A more detailed section of the GTC was written up as an Annex to include tables and analysis.

4.2 The Team then identified conclusions and recommendations for each component.

4.3 The Team leader wrote up all this material as the final report.