

START-UP WORKSHOP FOR THE WATER RESEARCH CENTER OF THE EGYPTIAN IRRIGATION MANAGEMENT SYSTEMS PROJECT

ALEXANDRIA, EGYPT

February 6-9, 1989

ISPAN Activity No. 638B

ISPAN Report No. 13



IRRIGATION SUPPORT PROJECT FOR ASIA AND THE NEAR EAST

Sponsored by the U.S. Agency for International Development





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AND THE NEAR EAST**

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Training Resources Group

The University of Arizona

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**Prepared for the USAID Mission to Cairo
under ISPAN Activity No. 633B**

AP02

by

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and
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ACRONYMS

ALIGU

CID Consortium for International Development

CSU Colorado State University

GOE Government of Egypt

IDC Information and Documentation Center

IMS Irrigation Management Systems Project

ISPAN Irrigation Support Project for Asia and the Near East

MPWWR Ministry of Public Works and Water Resources

PIO/P Project Implementation Order/Participant

PIO/T Project Implementation Order/Technical Services

TDY Temporary Duty

TOEFL Teaching of English as a Foreign Language

USAID United States Agency for International Development

WRC Water Research Center

Chapter 1

INTRODUCTION

1.1 Background

In December 1986, USAID/Cairo requested the Irrigation Support Project for Asia and the Near East (ISPAN) to conduct a project start-up workshop for the Water Research Center (WRC) of the Ministry of Public Works and Water Resources (MPWWR) of Egypt. The WRC project is one of ten sub-projects under the large umbrella Irrigation Management Systems (IMS) project sponsored by USAID and MPWWR. Six of the ten sub-projects are scheduled to begin during 1988-89. This workshop is the second start-up activity conducted by ISPAN for the IMS project. The first was conducted in January 1989 for the Professional Development Center.

In 1975 the then Ministry of Irrigation consolidated its research efforts into a Water Research Center in order to meet its needs for coordination and research management. The research activities of WRC are carried out by 11 research institutes:

- Water Distribution and Irrigation Systems Research
- Aquatic Weed Control and Channel Maintenance
- Drainage Research
- Groundwater Research
- Water Resources Development Research
- High Dam Side Effects Research
- Hydraulics and Sediment Research
- Survey Research
- Mechanical and Electrical Research
- Coastal Protection
- Soil Mechanics and Foundations Research

The goals of the USAID/WRC project are:

"To [do] research to provide solutions to problems facing Egypt in its activities for the control, use and development of Egypt's water resource [and ultimately] for [its] economic and social development.

"To [do] research to provide answers to key policy issues in the irrigation sector.

"To develop the long-term capabilities of the WRC and its research institutes to provide MPWWR and Egypt solutions to their irrigation and water resource problems."

The primary project activities include long-term academic training in the United States for WRC staff who will receive master's and doctor's degrees, in-country training by U.S. and Egyptian specialists who will conduct short courses and seminars and provide specialized on-the-job training, and equipment and commodities. The project team is led by the Director of WRC and consists of a contract with the Consortium for International Development (CID), a consortium of land-grant universities in the Western United States with Colorado State University (CSU) as the leader on this project. CID/CSU maintains three full-time resident advisors in Egypt and a home office support operation for coordination of academic training and technical assistance (TDY) staff.

1.2 Terms of Reference

ISPAN was requested to provide two training specialist/facilitators to:

- interview a cross section of WRC, CID, and USAID staff in order to determine project start-up issues and needs;
- analyze the interview information in order to determine goals and issues and develop a workshop design and schedule;
- conduct a four-day start-up workshop consisting of full group and small group problem solving activities based upon the general guidelines of the publication "Facilitator Guide for Conducting a Project Start-up Workshop (Edwards, D.B., and Pettit, J., WASH Technical Report No. 41, March 1988);
- and produce a draft field report before departure from Egypt containing workshop results and agreements.

1.3 Interviews and Findings

Fifteen persons were interviewed in Egypt in preparation for the workshop. This included all of the resident CID team, USAID, the directors of seven of the eleven research institutes, the Director of the WRC project, and administrative managers in WRC. In confidential interviews questions were asked of each regarding their roles, current activities at the institutes, understanding of the project, the roles of the technical assistance team (CID staff), and the issues that should be discussed at the workshop. Each interviewee was provided with an overview of the purpose of the project start-up workshop and the types of activities that would take place.

Prior to final design of the workshop, the interview information was analyzed and the workshop program, schedule, and procedures were designed. These were reviewed by a workshop steering committee consisting of the director of WRC, the USAID project officer and a representative of the CID team. After their approval, the final workshop preparation was completed.

Most directors of research institutes and all the consultants were individually interviewed. The following statements are generalizations based upon interviews with a cross section of project staff and represent those areas in which a majority of participants responded with similar questions or observations.

1.3.1 Project Management Issues

Roles and responsibilities of the technical assistance team: Persons interviewed were generally aware but not specifically clear on the roles of the three permanent advisors. The question was raised, what is the role of each advisor and how will we work with them?

Deciding priorities: How will project funds and resources be distributed among the institutes? What is the process for deciding who gets which resources? Before decisions are made, is there a process for consultation with institute directors?

Lines of communication: "Who shall I contact for what in the project? Do we contact the project director for everything? We need clear lines of communication in the project; this is our biggest problem. Where do different institutes communicate with each other and how do we help each other use resources?"

1.3.2 Project Information Issues

Basic project orientation: While most interviewees had an idea of the general lines of the project in terms of the three components of training/degree programs, equipment, and technical assistance, many had not read the project paper and had not received a copy of it. Many of the questions related to specific implementation issues, e.g., how to accomplish project goals.

Length of project: Most interviewed believed that the three-year time frame of the project was unrealistic. Many wondered how a Ph.D. could be completed within three years and how individuals would be supervised after the three years of the project were over.

1.3.3 Project Implementation Issues

Language preparation: Most interviewed had strong concerns about the difficulty of meeting the English as a foreign language (TOEFL) scores within the available time and using the current methods of language standards training. This was especially true for students entering the master's program. The basic question was, "Is there a better way to help candidates prepare for TOEFL examinations?"

There were a variety of ideas on this that will need to be examined: intensive programs in Egypt; family live-in training in the United States; special tutoring; and short study tours in the United States with non-formal training to accelerate learning.

Equipment ordering: What is the specific process and how can it be improved for ensuring that the proper, most up-to-date equipment is ordered in a timely way? Are there ways to streamline from the beginning to the end (expediting customs clearance)? Is there a way to obtain up-to-date catalogs for specifying equipment needs?

Placement of degree candidates: How can we ensure that there is a direct linkage between the needs and goals of the institute and the placement of the students in the right program and school? What specific procedures can we set up to ensure that this is carried out properly?

Pre-departure preparation of degree candidates or study tours: How can we better manage the orientation and pre-departure of candidates for overseas training? Past experience indicates the need for better preparation and a way to continue to communicate with students once they are placed to keep them informed of developments at home.

Technical assistance/TDY: What is the process for obtaining short-term technical assistance? What specific steps must be followed. How can we be informed of the status of the TDY request process? How can we make the best use of consultants? How can we set up a process to ensure that we are ready to use them and that their terms of reference are clear and understood and mutually agreed upon? How can we ensure that skills are identified and transferred during TDY assignments? How can TDY assignments be timed so that they do not overlap and we can deal with one consultant at a time?

Training and equipment: How can we ensure that overall training in-country is directly linked to using the equipment that is coming in? How can we make sure that the right short courses are developed and given here?

Management training: Many observed that specific training in management for upper-level staff was a need. Many observed that management was the key to success. Some asked, "Could a U.S.-based program be set up for senior managers that was specifically designed for the needs of institute directors, given that most of their training was in technical specialties but their jobs were now as managers?"

Chapter 2

THE START-UP WORKSHOP DESIGN

2.1 Overview of the Workshop

The start-up workshop concept and process was based on the need to shorten the time required to get a project up and running and to forestall implementation problems. This can best be accomplished by bringing the project's major stakeholders together and systematically addressing the issues determined in the interviews, providing uniform project information to all, and developing and/or reviewing draft work plans for the first year of the project. In this workshop, there were three groups:

- **WRC staff:** this included the directors of each research institute within the WRC system, the project director, and his administrative staff.
- **The CID team:** this included the three members of the resident technical assistance team from the University of Colorado and the home office project coordinator.
- **USAID:** The project officer attended full time and the irrigation department staff who work with other components of the IMS visited for one day.

The workshop was designed as a series of team-building activities wherein the entire project team was given tasks to complete in mixed small groups and to report back to the full plenary group. As recommendations and agreements were reached, they were recorded and typed up for final review and acceptance by the group. Copies of all workshop agreements were given to the participants prior to departure.

The facilitators directed the process, giving instructions to the group, monitoring the small group work and discussions, and facilitating the full group agreement and discussion process.

2.2 Workshop Goals

The workshop was designed to meet the following objectives:

- to provide an opportunity to exchange current information about the project that is essential to start up;
- to achieve understanding of and agreement and commitment to project goals and activities;

- to provide an opportunity for the project team to become acquainted;
- to provide the setting for all participants to reach agreement on the management roles and responsibilities of the Water Research Center, the contractor, and AID;
- to reach agreement on procedures for managing the project;
- an improvement in the ability of all participants in the project to work together as a team;
- to provide an opportunity to discuss and develop strategies for issues in project implementation that will affect the project.
- To further develop current draft work plans.

2.3 Workshop Schedule

The workshop was organized to take three and a half days. It started at 4:00 PM on Monday, February 6, 1989, and ended on the following Thursday evening at 7:30 PM. Following is the schedule of activities:

Day One: Morning

Workshop Opening

- Welcome and agenda for day one
- Introductions: Getting to know each other
- Goals, schedule, and norms

Project Information Panel and Questions

Day Two: Morning

Project Information Continued

Overview of consultants findings, interview results

Small group discussion of three project management issues

- Language preparation
- Equipment ordering
- Placement of degree candidates

Day Two: Afternoon

Full group presentation and discussion of three project management issues

Day Three: Morning

Small group discussion of four additional project issues

- Technical assistance/TDY
- Training and equipment
- Pre-departure preparation of degree candidates
- The roles of the CID/CSU team

Full group presentation and discussion of the four issues

Day Three: Afternoon

Tour of Coastal Protection Research Institute

Completion of four project management issues discussion

Review of draft work plans for institutes

Day Four: Morning

Review of draft work plans continued

Presentation to full group of draft work plans

Day Four: Afternoon

Presentations of work plans continued

Review of workshop agreements

Evaluation

Closing

2.4 The Workshop

2.4.1 The Opening

The workshop was opened with brief welcoming remarks by Chairman Abu-Zeid followed by the introduction of the two ISPAN facilitators. The agenda for the afternoon was explained. An opening exercise was conducted to acquaint the participants with each other. The task for individual participants was to interview the person least known to each. They were asked to find out the other's position and background and one thing the person would like to get out of the workshop. After this, each person presented the person interviewed to the full group. Following this, the facilitators explained the goals, agenda, and norms of the workshop. The norms for working together were that one person speaks at a time, the opinions of others will be respected, sessions start and end on time, and one should ask for translation when needed.

2.4.2 Project Information Session

A panel consisting of Dr. Abu-Zeid (WRC), Dr. Terry Hardt (USAID project officer), and Dr. Dan Sunada (CSU/CID) presented an overview of the project. The presentations included the project history, goals, a vision for the future, the relation of the project to each organizations mission, and each presenter's idea of the biggest challenge faced by the project. The group was divided into small groups and asked to make a list of the questions they wanted the panel to address about the project and agree upon the five most important questions. The questions were listed by the facilitators on flip charts and given to the panel for discussion (for a complete list of these questions, refer to Appendix B). A sample of the questions is presented.

- What is the relationship among the primary project actors; which institution/person should be contacted for what?
- How does the IMS training component relate to the WRC training component?
- What services will be provided by central laboratories? Who will be in charge and how do we have access to them?
- What are the procedures for supervision of students under joint supervision by universities in Egypt and the U.S.?
- What is the mechanism for funding by component?
- What are the regulations for expenditure of local funds?
- What is the organizational structure of the project and how does it differ from the previous project?

2.4.3 Presentation of Facilitators Findings from the Interviews

The facilitators presented the results of the individual interviews conducted prior to the workshop mentioned in Section 1.3.3 above. The interview results were used to provide a framework and rationale for the project management and issues discussions that followed.

2.4.4 Project Management Sessions

The objective of the project management session was to discuss and agree upon how project staff would work together. To open the session, the session structure was presented as follows:

- The facilitators presented some key ideas of good project management.
- Each organization group (WRC, CID, and USAID) will develop a list of project management expectations for the other two groups.
- A representative from each group will present and clarify expectations.
- The organizational groups will meet to discuss their response to the other group's expectations.
- Working agreements will be developed among the three organizations in the full plenary session.

In the development of expectations for each organization, the participants were asked to answer the following questions:

- How do you expect the other two groups to share project information with you? How often? what kind of information?
- What is the ideal working relationship you want with the other group?
- What kind of written reports do you want and how often? In what form should they be?
- How do you expect to make decisions that affect the other two groups?
- What other expectations do you have? List them.

As a result of this process, a number of agreements were reached by all. A summary of these agreements is given in the next chapter and the complete list is in Appendix B.

2.4.5 Discussion of Seven Project Issues

The session was the longest of the workshop and took the better part of a day and a half. The procedure was to divide the participants into small groups and assign an issue to the group for discussion and recommendations. After about two hours in the small group, a presentation was made to the plenary group for discussion and agreements. The selection of participants to each group was voluntary. The issue areas and questions discussed were:

- **Language preparation:** Is there a better way to help candidates prepare for TOEFL examinations? What recommendations can be made to better prepare candidates for study abroad in English?
- **Ordering of equipment:** What is the specific process for ordering equipment and how can it be improved in order to ensure that the proper, most up-to-date equipment is ordered in a timely way?
- **Placement of degree candidates:** How can we ensure that there is a direct linkage between the needs and goals of each institute and the placement of students in the right program and school?
- **Pre-departure preparation of degree candidates or study tour participants:** How can we better manage the orientation and pre-departure of candidates for overseas training? How can we effectively communicate with students while they are studying and keep them informed of developments in their home institutes?
- **Technical assistance/TDY:** What is the process for obtaining short-term technical assistance and what steps should be followed? How can institute directors be kept informed of the status of their TDY requests? How can we make best use of the consultants? How can we ensure that skills are transferred by TDY consultants?
- **Training and equipment use:** How can we ensure that overall training is directly linked to using the equipment that is coming in? How can we make sure the right short courses are developed and given?
- **The roles of CID staff:** What are the specific roles of each person working on the CID team here and abroad. How should the permanent CID team staff be used?

2.4.6 Reviewing and Developing Draft Work Plans

In this session, participants were given copies of the draft work plans that had been developed before the workshop with the assistance of short-term CID consultants. Institute directors were grouped with two or three colleagues with similar areas of research, and a member of the CID team and an administrative staff person was also assigned. The task for the small group was to review each draft work plan for feasibility, completeness and clarity, add or delete work items as needed, and prepare a summary report on flipchart paper that would be used to explain the work plan to the full group. The presentation should:

- describe the goals of the institute and how the work plan will support those goals;
- list and explain the major research projects planned for the next year;
- include overall comments from the subgroup on the realism and achievability of the work plan;
- Briefly summarize the components of the work plan number of degree programs, number of hours of TDY, and equipment budget.

After work in small groups, each institute director explained the work plan to the full plenary. Areas of overlap with other institutes were identified and noted. At the end of the session, agreements were made and guidelines were given on the requirements for the next submission of the work plans.

2.4.7 Final Workshop Agreements and Summary

This session consisted of a review of all of the products and agreements made during the three and a half days of the workshop. Copies were distributed of the products developed in each session (these had been word processed). Small groups reviewed each product for clarity and accuracy. A person from each group compiled a master to give to the facilitators to use in correcting the record. The full group was convened and major discrepancies, omissions, or errors were corrected.

2.4.8 Evaluation and Closing

The workshop evaluation form was distributed and filled out by the participants. Final thanks were given and observations on the workshop were made by representatives of each of the participating organizations and the workshop was closed.

Chapter 3

WORKSHOP RESULTS AND AGREEMENTS

3.1 Overview

From participants reactions in the evaluations and from informal comments, it is evident that this workshop was highly successful. The facilitators concur with this assessment. The major results were:

- A common understanding of the project and the roles and responsibilities of participants. Specific project objectives were clarified, and this project was perceived as different from a somewhat similar prior project.
- Information was exchanged and agreements were made on important project management issues.
- An important opportunity was provided for key individuals to step back from their busy schedules and spend time together exchanging ideas and discussing potential project implementation problems before they occurred.
- Team building was initiated in the form of increased understanding of how individuals will work together, an increased appreciation for the personalities of the participants, and the potential contributions of each. Overall, commitment to the project and its goals was increased.
- Each institute reviewed draft work plans and developed a more realistic idea of what could be accomplished within the planned time frame of the project.
- Expectations were stated and agreements reached among WRC, CID, and AID on training, technical assistance, commodities, meetings, reports, decision-making, communication and sharing of project information, and the work planning process.
- Recommendations were made and accepted with regard to language preparation, equipment ordering, placement of degree candidates, pre-departure preparation of degree candidates and study tour participants, the use of TDY consultants, structuring of training for equipment use, and the roles of the CID team.

- All agreed that the time allocated for academic training, equipment procurement, and TDY schedules was much too short and that every effort should be made to extend the project so that the objectives could be met.

3.2 Summary of Specific Outcomes and Project Management Agreements

In this section, the specific agreements and recommendations by session are summarized. For a full copy of each original workshop product, refer to Appendix B. Minor issues and long lists of technical recommendations are omitted from this summary. All management agreements are presented in full.

The WRC agreed to meet the following expectations of the CID group:

- To identify qualified individuals as candidates for degree programs who have passed the TOEFL/ALIGU, have adequate academic qualifications, and have agreed on their subject areas.
- To develop training plans that identify where, how, why, what and when training will take place in each institute. WRC agreed with the understanding that this would be done according to the work plans and would be jointly decided.
- To provide quarterly progress reports of the student's status. USAID agreed to provide a format for this.
- To provide detailed scopes of work for TDY that identified the counterpart supervision, appropriate dates, the expected results, and the desired length of time. CID agreed to prepare these scopes of work jointly with the WRC institute directors within one month of the end of the workshop for the coming year.
- To provide equipment specifications, determine training needs, plan for maintenance, spare parts and supplies, determine the ordering date, and specify how the equipment would be used. The WRC agreed to this with the understanding that the CID team would assist with this and include it in the approved work plans.
- Meetings will be frequent, informal, and open.
- Reports will be prepared and submitted according to the terms of the project agreement, unless special reports are requested.
- WRC agreed that institute directors would prepare action memos for the chairman's approval and AID's concurrence.

The WRC agreed to meet the following expectations of USAID:

- To provide both formal and informal information in a timely and regular manner in both written and oral form. Not to present AID with surprises. To use routine procedures in implementing the project and to respond to special requests as required.
- To work as a team with AID and solve problems together; to share information and responsibilities as required. To provide informal oral reports to AID at the weekly meeting.
- To provide sufficient background information for decision-making by AID or to justify exceptions.
- To be knowledgeable about other MPWWR decisions that may affect the WRC component.
- To request that trainees provide quarterly reports of progress to the U.S. Office of CID and CID will forward them to WRC. The reports should describe in detail the trainees' situation and not be limited to the current reporting format, which is of little value.

The CID team agreed to meet the following expectations of the WRC:

- To provide workshops every six months for the exchange of project information.
- To provide written information and reports as requested.
- The resident team will meet monthly with WRC leadership; the home office staff will attend semi-annual meetings.
- To provide progress reports according to the contract and to keep WRC informed of new rules and regulations, project progress, and constraints and major issues.
- To work with WRC as a team. To work according to responsibilities and regulations as specified in the contract supported by social relationships and activities.
- To provide written reports as stated in the contract and to provide them in concise language and according to agreed-upon formats.
- According to the terms of the contract and through the joint work planning process. Other project implementation requirements are subject to joint consultation.

- To minimize paper work after work plan approval.
- To find a more efficient way to communicate with trainees.
- The regularly evaluate the TDY program and modify it in relation to needs and with approval from the institutes.
- To establish a mechanism that allows institutes to participate in reviewing equipment specifications and approve them prior to selection.

The CID team agreed to the following expectations of USAID:

- To provide information, in writing and orally, both formally and informally, in a timely and regular fashion. Not to surprise AID. To communicate routine implementation issues and to address special issues as required.
- To work as part of a team. To work with AID on problem solving and sharing information and to let AID know about progress and any major issues at the weekly meeting.
- CID team members agreed to familiarize themselves with the contract.
- CID agreed to provide sufficient background and information for AID to be able to make decisions or justify exceptions.

USAID agreed to the following expectations of CID:

- To process PIO/Ps and PIO/Ts rapidly with the understanding that after completion of a PIO/P-T, USAID's training office requires one month for processing but may complete them in less time.
- To provide technical assistance rapidly.
- To respond rapidly to requests for commodities.
- To participate in project meetings and provide concurrence as appropriate.
- To review reports, action memos, and concur as appropriate.
- AID agrees that action memos may be prepared by institute directors for review and signing by the director of WRC and will alter its requirements to fit the needs; but the information in action memos currently required is still necessary for decision makers. There are several ways to simplify these:. For example, they can be compiled by the

institutes quarterly. All action memos should refer to the work plan. A review every six months is possible and desirable. These reviews must be by component in accordance with funding categories.

AID agreed to the following expectations of WRC:

- To agree to workshops every three to six months for the exchange of information and review of project status.
- To provide written information and make reports available.
- To attend project review meetings every two months with the understanding that WRC should suggest the members and agenda.
- To communicate about new regulations and rules, project progress, and major constraints.
- To be governed by formal responsibilities and regulations and supported by social relationships and activities.
- Project agreement, rules and regulations should dictate decision making, with mutual discussions whenever necessary.
- USAID will organize a workshop to brief WRC on similar projects with other countries regarding rules and procedures.

Agreement for Work Plan Follow-up:

After the presentation of all of the draft work plan summaries, the group agreed that each detailed work plan, upon final submission, should take into consideration and reflect the following:

- The need for staff training over the life of the project
- The relationship to other institutes and any overlap
- The need for conferences and workshops
- Costs for technical assistance and training will need to be harmonized to meet budget requirements
- Requests for additional staff need to be clearly defined
- Not all candidates should be trained at Ft. Collins
- Overall institute goals and accomplishments needs to be differentiated from the project accomplishments

- The names of TDY and student need only be identified for the first year
- A Gant Chart for the entire project should be provided
- It is permissible to provide a trip home for long-term students to gather data for thesis work
- Professional meetings for Ph.D.s should be provided for more than once during the course of study. (M.Sc. candidates should be provided with one trip to a professional meeting.)
- Budget targets by categories will be given to each institute by the chairman
- Each institute director should submit a revised draft work plan for review within three weeks of the end of this workshop (February 9, 1989)
- A review panel for final work plan presentation will be set up by the chairman
- Terry Hardt and Jim Hedrick will look up the regulations regarding age restrictions for academic training and report back to WRC.

Chapter 4

RECOMMENDATIONS RESULTING FROM THE WORKSHOP

4.1 Language Preparation

All current and future candidates for study abroad should first be tested to determine their current English language levels and grouped accordingly. A special intensive language training program should be designed. ISPAN will assist in identifying the appropriate language specialist for CID to assign to TDY and help with the terms of reference. The program will be for 25-30 students and will consider an approach such as a live-in arrangement for intensive work. In addition, each institute should encourage weekly, short discussions on technical topics in English. Currently planned courses given in Egypt conducted by U.S. faculty will continue. Expatriate TDY staff will be encouraged to stay with Egyptian families of potential students. A seminar will be arranged on how to pass the TOEFL test.

AID will seek a mechanism to allow short-term training for candidates who have not yet met minimum language requirements.

Taking of TOEFL exams can be accelerated by paying higher fees. Jim Hedrick will investigate the possibilities of paying these fees in Egyptian pounds rather than U.S. dollars.

4.2 Ordering Equipment

Before ordering equipment, required spare parts should be identified. All equipment orders should state their relation to the work plan and the purpose of the equipment. The senior researcher from CID will classify and quantify equipment orders; CID will provide catalogs. Each director, with the help of the CID TDY person, should develop the equipment requirements first. The senior researcher from CID will make an order schedule and computerize it within the next two months if possible. Each institute director should develop and send action memos that include maintenance, installation, testing and training. Mr. Hedrick will handle the action from there.

Local procurement should include an overall package, whenever possible, for installation, maintenance, and training. Overseas equipment should be linked to local dealers for service agreements.

Mr. Hedrick will track orders, coordinate their receipt and clearance through customs, and develop and coordinate an inventory control system. Each institute director should designate someone to be responsible for equipment.

4.3 Placing Degree Candidates

Each institute should identify its priority needs first. More information needs to be made available by CID about training opportunities in the U.S. TDY staff should be from a variety of U.S. universities. Study tours of institute directors should be at a variety of U.S. universities and institutes. Each director should select a primary and an alternate candidate for each position when possible. Each institute needs to be informed about the placement of students, the school, and their topics of study. Pre-travel orientation should be provided for each student. Whenever possible, a faculty affiliate from the student's institute should serve as a mentor and on the degree committee of the student.

4.4 Pre-departure Preparation of Degree Candidates and Participants

WRC/CID should set up a comprehensive pre-departure orientation program that would include at least discussions with former students, maps, travel information, emergency telephone numbers, and general and cross cultural information. It should also include information about the course of study, course requirements, and the relationship with the mentor and include the mentor in the orientation. In addition, each institute should provide a pre-departure orientation that includes assigning a mentor, discussion of the specific course of study, and expectations by the institute of the student.

Dr. Safwat and Dr. Amer agreed to develop a program for the institutes.

The Chairman's staff (IDC) agreed to work with CID to develop a package and program for pre-departure orientation.

Dr. Hardt and Mr. Hedrick will make recommendations on speeding up documentation procedures.

Written guidelines will be compiled by IDC on per diem, book allowance, supplies, conference, and travel advances and will be discussed during the pre-departure orientations.

The Information/Document Center (IDC) will develop a system for communicating with students which will include a monthly newsletter.

Each institute will be responsible for communication between the student and mentor (by visits to the United States). Information on mail, conference calls, calls home, and emergency contact will also be provided. Each student will be required to provide written reports to WRC each semester or quarter.

CID will design a workshop to be held in the United States for all students, either during the summer or during holiday break. This workshop will focus on team-building and briefings on work in progress in Egypt, as well as management issues.

4.5 Technical Assistance

It is the responsibility of each institute to define the specific needs and field of contribution of the consultant. Lists of possible TDY candidates will be provided by CID. Other identification will be made through personal contact by institute directors on study tours. The tentative time and duration of the visit will be agreed upon by the institutes and CID. The final arrival of the TDY is subject to clearance by the institute. The institutes agree to prepare the terms of reference in advance and send them to CID. Overall requests for the person indicated will be six months in advance, and the specific terms of reference will be provided two months in advance. Each institute agrees to identify a counterpart for the TDY who will work with them during their stay. The TDY consultant will prepare and submit a draft report prior to departure. A debriefing will be conducted for the institute prior to departure. The institutes will evaluate the TDY mission. The institutes will forward appropriate background information on the current work situation and the problem to be addressed by the TDY prior to arrival in Egypt.

The format for TDY mission evaluation will be prepared by Dr. Abu-Zeid and Mr. Brooks.

Each institute will prepare a work plan for the next year to define TDY needs two to three months before the beginning of the next work year.

CID will provide lists and Curriculum Vitae of potential TDY staff.

A detailed work plan for the first year will be jointly prepared by CID and the institutes for TDY.

4.6 Training in Equipment Use

All the equipment should be classified and specifications for operations and maintenance obtained. Each institute should plan for the training and coordinate it through work plan planning. Contacts for potential training should be established through factory representatives and TDY staff. Whenever possible, suppliers should provide the training.

It is recommended that WRC consider setting up a department that will provide electrical, mechanical, and electronic services and carpentry and metal work.

Until this is done, each institute is responsible for providing adequate storage and handling of spare parts in accessible locations. A scheme for operations and maintenance training should be developed by each institute. Untrained personnel should not use sophisticated equipment.

4.7 The Roles of CID Staff Members

The Senior Researcher (Roy Brooks) will establish routine meetings with each institute director. The schedule for this will be developed by Mr. Brooks and Dr. Abu-Zeid. The senior researcher will assist in implementing the work plans with

regard to training overseas, in-country training, and technical assistance related to equipment. He will introduce the TDY consultant and participate in briefings and debriefings, assist institute directors in developing action memos, and provide technical assistance in his areas of expertise. The role will be reviewed after three months.

The Program and Administrative Office (Jim Hedrick) will prepare formats for action memos. He will work mainly through project management and the chairman of the WRC.

The Manager of Systems Development and of Analysis and Design (Dr. Kay Seibert) communicates mainly with the chairman. She is responsible for setting up the library and the computer systems for information management. Because of the large number of duties of this position, it will be reviewed after three months.

The Project Coordinator and Training Officer (Dr. Dan Sunada) coordinates all administrative and financial responsibilities of the project and acts as CSU campus representative.

The Technical Advisor (Professor E.V. Richardson) assists institute directors and trainees when they arrive in the United States in technical matters in relation to program identification for students. He works on TDY assignments and serves as a resource in his area of expertise.

4.8 Final Recommendations and Conclusions

The above detailed recommendations indicate a great deal of work and a comprehensive workshop process. The most important need will be to follow up on all of the agreements and ensure that they are adhered to and acted upon.

In order to ensure that the workshop agreements are met, it is suggested that bi-monthly project review meetings systematically track each item in this report and discuss progress.

In approximately eight months, just prior to planning for the next annual submission of work plans, a facilitated project review workshop (or project monitoring workshop) should be conducted using the ISPAN resource.

Because of the realistic assessment of the time needed to complete the academic training and equipment procurement, it is recommended that USAID explore every possible avenue to extend the project so that its goals can be met. It is clear upon project start up, that the time is simply too short by at least two years to meet project goals for long-term training and equipment identification, procurement, and installation and training.

This has been a very important and successful workshop. The facilitators believe that the considerable skills, experience and abilities of the total WRC/CID/AID project team have every promise of achieving the goals of the project.

Chapter 5

RESULTS OF PARTICIPANTS' EVALUATIONS

The participants evaluated this workshop very highly. A complete evaluation summary is provided in Appendix C. All of the goals of the workshop were considered to be met very well. On a scale of one to five participants scored the achievement of goals on an average well above four. The highest goal achievement was 4.89 (to provide an opportunity for the project team to become acquainted). This was closely followed by 4.83 (to achieve understanding, agreement, and commitment to project goals and activities). Team building was also rated highly as an area of achievement (4.73). The two lowest rated goal areas (among highly rated goal achievement areas) were developing strategies for resolving project implementation issues (4.38) and developing draft work plans (4.66). However, experience with workshop evaluations indicates that when scores are all above 4, the participants were pleased with the outcomes.

When asked what, in the opinion of the participants, was the most important benefit of the workshop, some participants replied:

- "A common understanding of the project, roles and responsibilities, and major constraints" [several commented similarly].
- "Exchange information, agree on the management roles and providing the opportunity for the project team to become acquainted."
- "Drawing the key persons out of their too-busy daily schedules to gather together and discuss major issues about the project before it starts."
- "Setting the objectives, work plan of each institute in a proper way. Each institute knows better the other's work plans."

When asked what could be done to improve the workshop, most participants responded that the workshop was well run. Two individuals felt that the work plan review and presentations needed clearer instructions. One participant felt that the workshop timing was too tightly controlled and another felt that it should have been more tightly controlled.

The participants responded very favorably on the high quality of the facilities and the arrangements. Most felt that the working atmosphere and the arrangements were very good.

When asked what areas were left unresolved or needed special attention for follow-up, most respondents said "nothing was left." Two respondents believed that more work was needed on understanding the roles of the CID team and their

responsibilities and relationships within the project and the way that the technical assistance consultants would work. One respondent felt that it was unclear when institute directors would be given revised planning and budget targets for the work plan resubmission.

The facilitators uniformly received very high marks from the participants. Most evaluators wrote excellent or very good. Remarks included: "Excellent organization, getting closure on actions needed was superb. Relationship with trainees commendable." One respondent said "...at times, you assumed a project management role rather than a facilitator."

APPENDIX A

WORKSHOP PARTICIPANTS

**Water Research Center
Project Start-Up Workshop
Feb. 6-9, 1989**

ORGANIZERS and PARTICIPANTS

Organizers:

Dr. Abu-Zeid, Chairman WRC
Mary Halim, Water Research Center
Mervat Hassan, Water Research Center
Mohamed Fahmy, Water Research Center
Nairy Kamberian, Water Research Center
Eng. Ahmed Bayoumi, Training and Manpower Development

Facilitators: Irrigation Support Project for Asia and the Near East (ISPAN)

Kathy Alison
Dan Edwards

Water Research Center:

Dr. Safwat Abdel Dayem, Secretary General, WRC
Eng. Fouad Ramadan, Director of Planning and Follow-up Dept., WRC

Research Institute Directors:

Dr. Fakhry Khattab, Weed Control and Channel Maintenance Research Institute
Dr. Kamal Hefni, Groundwater Research Institute
Dr. Hassan Amer, Drainage Research Institute
Dr. Awwad A. El-Meligi, Deputy Director, Water Resources Research Institute
Dr. Mona El-Kady, Survey Research Institute
Dr. Guirgis Tawadros, Mechanical and Electrical Research Institute
Dr. Ahmed Khafagy, Soil Mechanics and Shore Protection Research Institute
Dr. Mohamed Gasser, Hydraulics and Sediment Research Institute
Dr. Mohamed El-Mottassem, Aswan High Dam Side Effects Research Institute

CID/CSU Representatives:

Dr. Katherine Seibert, Information Systems Designer
Dr. Dan Sunada, Campus coordinator
Dr. Roy Brooks, Senior Researcher
Mr. Jim Hedrick, Program Administration Manager

USAID:

Dr. Terry Hardt, Project Officer

APPENDIX B

WORKSHOP PRODUCTS AND AGREEMENTS

**Session 3: Project Information
(Panel Discussion)**

Panel Members

- Dr. Abu-Zeid (WRC)
- Dr. Terry Hardt (USAID)
- Dr. Dan Sunada (CSU/CID)

Suggested Discussion Points

- Brief history and Mission of Project
- Vision for future of project
- Most important priorities of project
- How project will fit into WRC (ministry) and USAID's IMS?
- What will be the biggest challenge in getting the project implemented?

Developing Questions About the Project

Task:

- Meet in your group-table
- Write a list of questions you want to address to the panel
- Agree on the 5 questions your group most wants to ask

Questions for panel

- Can this project set up a trust fund? (Government allocates money as counterpart fund)
- How does IMS training component relate to WRC training component?
- Relationship between primary project actors--who to contact
- Funding level of project (WRC) and individual institutes
- What are the procedures for supervision of students under joint supervision and level of pay (later answered)?
- What were EWUP project goals? What was achieved? Of what use were the results to society?

- What services were provided by Central Labs? Who? How do we have input? Coordination?
- What was the mechanism for funding by component (TA, training, commodities)?
- What plans exist for establishing central workshop for equipment and training in maintenance?
- Why was there no pilot project segment under WRC to conduct research in common geographic areas?
- Predeparture orientation and follow-up procedures for project?
- What is the organizational structure of this project? How is it different from the last project?
- What is the role of IDC? Information/Documentation Center? What are the internal and external communications links?
- How to develop links between institute directors and status of procurement of equipment. What about provision and maintenance of equipment?
- Strategy for retaining personnel--How will the project assist?
- What are the regulations for expenditure of local funds?

Session 5: Project Management

Objective: To discuss and agree upon how we are going to work together.

Session Overview:

- Present some key ideas of good project management.
- Present small group task - Each group (WRC/CID/USAID) develop list of expectation for project management.
- Present and clarify expectations.
- Respond to expectations.
- Develop working agreements.

Aspects To Consider For Complete Project Management:

- A way to share information.
- Clear roles and organizational relationships (who is responsible to whom).
- Formal report requirements - Frequency and format clear.
- Decision-making norms understood and agreeable to all.
- Monitoring performance - A method that gives results and can correct mistakes.
- Planning mechanics in place.
- Easy communications process.

Task: By Organizational Groups.

Discuss and list: What are your expectations the other two groups?

- How do you expect the other two groups to share project information with you? How often? Kind of information?
- What is the ideal working relationship for each?
- What kind of written reports? How often? What form?
- How do you expect to make decisions that affect the other two groups?
- Other expectations or questions, etc.

CID Expectations for:

<u>ISSUES</u>	<u>WRC</u>	<u>USAID</u>
1. All Training	Identify Qualified Individuals: a) Passed TOEFL/ALIGU b) Adequate Academic Qualifications c) Agreement on Subject Area. d) Training Plan. Where, How, Why, What, When. e) Quarterly progress report of student's status. Format will be provided by AID (Terry Hardt).	Process PIO/P (rapidly)
2. Technical Assistance	Scope of Work. a) Counterpart/ Supervision b) When c) Expected Output d) Timing Desired	Rapid Action
3. Commodities	a) Specification b) Training needs c) Maintenance/Spare Parts Supplies. d) Ordering Date e) How Used (See Comments)	Rapid Action
4. Meetings	Frequent, informal, open.	Concurrence and Participation
5. Reports/Decisions	(See Above) Expect institute directors to prepare all action memos for chairman's approval.	Concurrence

WRC Comments on CID Expectations:

- 1) d. According to work plan, but can be revised and should be decided jointly.
- 3) a-e. Prepared jointly by WRC Institutes and CID. They will be done within one month.

AID Comments on CID Expectations:

- 1) PIO/P's - When they are completed, USAID's training office requests one month for processing. Office has been averaging less time.
- 2) Action Memos - AID will alter requirements to fit needs but this information is still necessary for decision makers.

WRC Expectations for:

<u>ISSUES</u>	<u>USAID</u>	<u>CID</u>
1) Share Project information	1) Workshops Every 3-6 Months. 2) Written communications 3) Reports 4) Meeting every 2 months	Workshops, 6 months ... Same Per request Contribute to WRC newsletter Monthly meetings with resident team. Semi-Annual meetings with home office staff.
Kinds of Information	1. New regulations/rules 2. Project progress 3. Constraints and major issues	
2) Ideal Working Relationship	Ruled by responsibilities and regulations, supported by social relationships and activities	Team Work Same
3) Written Reports	None for USAID	As stated in contract (Concise and according to agreeable formats)
4) Decisions that Affect Other Two Groups	Project agreement, rules and regulations should dictate such decisions, with mutual discussions whenever necessary	Contract and work plan. Other project implementation requirements are subject to joint consultation.

WRC Expectations (continued):

<u>ISSUES</u>	<u>USAID</u>	<u>CID</u>
5) Other Expectatations	(Both)	
a) As long as work plan is approved, we should work towards minimizing paper work.		
b) A more efficient way of communication with trainees abroad should be established.		
c) USAID can organize a workshop to brief WRC on similar projects with other countries regarding rules and procedures.		
d) TDY implementation program should be regularly evaluated and modified according to Institutes' inputs and clearance.		
e) A mechanism should be established through which institutes <u>should</u> participate in reviewing specifications of equipment as stated in work plan and be consulted for acceptance prior to selection.		

AID Reaction to WRC Expectations:

- a) Meeting every 2 months - WRC should suggest members, agenda - AID will assist.
- b) Request trainees to submit quarterly progress reports to CID - CID forward to WRC - current format of little value.
- c) Action Memos: There are several ways to simplify. For example, they can be compiled by institut^e or quarterly. All action memos should refer to the work plan. A review every 6 months is possible and desirable. These reviews must be component-funded.

USAID Expectations for:

<u>ISSUES</u>	<u>WRC</u>	<u>CID</u>
1. Informational Area	Informal/Formal Timely/Regular Written/Oral No surprises. Routine implementation issues. Special issues as required.	Same
2. Working Relationship	Based on team effort. Problem solving. Sharing information and responsibilities. Oral reports to AID on major issues discussed at weekly meeting.	Same
3. Other Expectations:	Provide sufficient information (background) to make decisions or justify exceptions. Be knowledgeable of MPWWR decisions that may affect WRC component.	Same Team members should be familiar with contract.

Session 6: Discussion of Issues

Objective: Discuss and develop strategies for dealing with the following seven issues:

1. Language preparation
2. Equipment ordering
3. Placement of degree candidates
4. Pre-departure preparation of degree candidates or study tours
5. Technical Assistance/TDY consultants
6. Training and equipment
7. Role of CID/GSU Team

Session Overview:

1. Round 1: Three different groups each address a different issue.
2. Plenary Meeting:
 - Each group presents its recommendations.
 - Total group discusses.
3. Round 2: Three different issues addressed.
4. Plenary Meeting:
 - Recommendations.
 - Discussion

Task: Developing Draft Recommendations

- Meet in your assigned group and develop *specific, implementable* recommendations on what can be done to resolve the issue. Define the problem, develop recommendations.
- Select a person to lead the discussion, watch time and write on flipchart.
- Be prepared to present recommendations to the full group.

Management Issues

Issue 1: Language Preparation

The group considered the following questions:

Most interviewed had strong concerns about the difficulty of meeting the TOEFL scores within the available time and using the current methods of language training. This was especially true for students entering the master's program. The basic question was "is there a better way to help candidates prepare for TOEFL examination?" There were a variety of ideas on this that will need to be examined: intensive programs in Egypt; family live-in training in the United States; special tutoring; and short study tours in the U.S. with non-formal training to accelerate learning.

Problem Definition:

- Not enough candidates to send for training abroad.
- Few pass TOEFL and ALIGU the first time.
- English should not be the only criteria for selection.
- Certain grades have to be achieved; USAID is very strict on that.
- There are people with different levels of English preparation.

Recommendations:

- Send all aspirants to an English level determination test according to a pre-set program (prepare a program within one month).
- Group the aspirants according to level.
- Design a special intensive English program.
- 25-30 students.
- More than one course can be given at the same time (prepare terms of reference for an expert to design the course).
- Encourage weekly discussion at each institute on research subject. The discussion should be done in English so researcher can practice language.
- Continue to present courses for credit in Egypt. Courses should be conducted by U.S. faculty in English.
- Encourage seminars by TDY consultants.

- Encourage expatriates and TDY consultants to work and stay with Egyptians.
- Arrange a seminar on how to take and pass English test.
- Provide sample TOEFL test and arrange for trial test.
- Provide English language training in the U.S. for one semester to students who have TOEFL scores between 500-550. This will help them to adjust to the new environment and improve their English.
- Encourage short-term training abroad for candidates with score of 450-500.
- Encourage candidates to live with American families in the U.S.
- Invite the USAID Project training officer to discuss training program.
- A mechanism will be sought by USAID to allow short-term training for candidates who have not met minimum language requirements.
- Taking of TOEFL exams can be accelerated by paying higher fees. Jim Hedrick will reinvestigate the possibility of paying these fees in Egyptian pounds rather than U.S. dollars.

Issue 2: Ordering Equipment

The group discussed the following question:

What is the specific process of ordering equipment and how can it be improved to ensure that the proper, most up-to-date equipment is ordered in a timely way? Are there ways to streamline from the beginning to the end (expediting customs clearance)? Is there a way to obtain up-to-date catalogs for specifying equipment need?

Recommendations:

- Before equipment is ordered, identify equipment/spare parts, purpose and maintenance plan and training plan. Show coordination with work plan. Institute Director and senior researcher should consult (latter should coordinate with directors who are ordering similar equipment) Standardize the equipment as much as possible.
- Classification and quantification of equipment should be coordinated by the Senior Researcher on the team.
- Order catalogs and bulletins to help in the selection of equipment. (Senior Researcher assists in getting catalogs. Some catalogs are already available at WRC).
- Director, TDY consultant, senior researcher should jointly develop equipment specifications and include the quantity, guarantees, spare parts, etc.
- Make order schedule (Senior Researcher, computerize code, develop timeline). The above 5 steps should be completed in the next 2 months, if possible.
- Develop and send action memo to order (include maintenance, installation, testing, training.) (Hedrick handles after receipt of action memo.
- Hedrick will track the orders.
- Hedrick will coordinate the receipt of equipment and clearing through customs.
- Hedrick will develop and coordinate inventory control.
- Maintenance of equipment: Institute director should designate someone to be responsible.
- Training will be discussed later.
- Local procurement should include overall packages when possible for installation, operation and maintenance, and training. If it is overseas procurement, try to include local dealers who would provide installation, O&M, and training.

Issue 3: Placement of Degree Candidates

The group discussed the following question:

How can we ensure that there is a direct linkage between the needs and goals of the institute and the placement of the students in the right program and school? What specific procedures can we set up to ensure that it is carried out properly?

Recommendations:

- Identify needs and priorities of each institute.
- Request more information about training in U.S., encourage TDY from a variety of Universities.
- Study tours of directors should include visits to a variety of U.S. universities and institutions.
- Set selection criteria for long-term academic training. Criteria should include:
 - Institute's needs.
 - University grades and training.
 - Minimum one year experience.
 - Commitment to institute.
 - Language.
- Select first person and place and alternate person and place, if possible.
- Be sure the institutes are informed about the placement of students, including which school and the topic of study. This feedback is very important.
- Provide a report every semester of any changes in program by universities.
- Provide pre-travel orientation for participants by institute and TDY consultants if possible.
- Appoint faculty affiliate (Ph.D.) from the student's institute whenever possible to become a mentor and be part of student's committee.
- Future selection of newly appointed engineers should continue to give them a chance to express their interest in the area of work within WRC.

Issue 4: Pre-departure Preparation of Degree Candidates or Study Tours

The group discussed the following questions:

How can we better manage the orientation and pre-departure of candidates for overseas training? Past experience indicates the need for better preparation and a way to continue to communicate with students once they are placed to keep them informed of developments at home.

Problem Definition:

The need for better preparations and improved communications.

Pre-departure Preparations:

- A. Different culture.
- B. Documentation (ticket, visa, passport, etc.)
- C. Regulations.

Recommendations:

1. Pre-Departure Orientation

Responsibility of WRC/CID should include

- Discussions with former students
- Maps
- Travel information
- Emergency telephone numbers
- General information.

Cross-cultural information

- University differences, course requirements, relationship with mentor, other faculty, study patterns, tools.
- Food, accommodation, etc.

Pre-departure orientation by institutes.

- Mentor assigned
- Specific course of study
- Expectation of student and institute (Dr. Safwat and Dr. Amer will develop a model).

IDC will coordinate with/CSU and Institute to develop whole orientation package.

Define what is critical to be done here and what can be done at CSU.

2. Documentation:

Terry Hardt and J. Hedrick will make recommendations on speeding up the process. Timely delivery of documentation (at least one month before departure, if possible, but this may not be feasible).

3. Regulations:

Provide adequate information on:

- Per diem
- Book allowance
- Supplies
- Conference and travel advance
- Jim to complete program.
- Return to Egypt to gather data. etc.

This information will be developed into written guidelines for participants and reviewed in predeparture orientation.

2. Communication with students in the U.S.

- Newsletter (monthly from WRC).
- Egyptian mentor should visit student in U.S. at least once per year.
- Pouch (mail).
- Conference calls (CID office, mentor, responsible institute director, students and student adviser) as needed.
- Emergencies (contact home).
- Students should provide a written report to WRC each semester/quarter.
- Design a one-week workshop to be held in the U.S. for all Egyptian students either during the summer or a holiday. WRC should send representative(s) to report on institutes. Will help in team development, monitoring, communications.

Issue 5: Technical Assistance/TDY

The group discussed the following question:

What is the process for obtaining short-term technical assistance? What specific steps must be followed? How can we be informed of the status of the TDY request process? How can we make the best use of consultants? How can we set up a process to ensure that we are ready to use them, their terms of reference are clear and understood and mutually agreed upon? How can we ensure that skills are identified and transferred during TDY assignments? How can TDY assignments be timed so that they do not overlap and we deal with one consultant at a time?

Recommendations:

- Each institute defines the specific field for the consultant.
- Identify the TDY consultant
 - By providing list of possible TDY consultants covering all fields of WRC (by CID).
 - By personal contact through the study tours by the directors and senior staff.
- Tentative time of visit and duration must be jointly agreed upon by the institute and TDY consultant through CID.
- Final arrival of TDY consultant is subjected to clearance by the institute.
- Detailed work-plan for the first year should be jointly prepared by CID and the institute.
- Prepare and send terms of reference (by the institute) in advance to CID. Request for person 6 months in advance. Terms of Reference completed 2 months in advance.
- Identify the counterpart(s) from the institute who will work with the TDY consultant during their stay.
- The responsibilities of the TDY consultant may include, but are not limited, to the following:
 - Analysis of data available.
 - Writing reports and giving recommendations for the problems.
 - Preparation of technical joint papers for publications. Final production may be completed at Ft. Collins as required.

- Give lectures.
- Training in the operation of equipments and software.
- Training and technology transfer.
- TDY consultant should prepare and submit a detailed draft report of the visit before departure which should include follow-up recommendations. A debriefing should be held before departure.
- Evaluation of TDY mission by institute staff. Format to be determined by Dr. Abu-Zeid and Dr. Brooks.
- Develop a work plan for the next year to define TDY needs 2-3 months before beginning of the next work year.
- Appropriate background information about the current situation at the institute they will be working with should be sent to TDY consultant in advance.

Issue 6: Training and Equipment:

The group discussed the following question:

How can we ensure that overall training in country is directly linked to using the equipment that is coming in? How can we make sure that the right short courses are developed and given here?

- Ensure overall that training is linked to equipment used.

Recommendations:

- Classify equipment.
- Obtain specifications for operations and maintenance.
- Program the training.
- Establish contacts with potential training personnel.
 - TDY consultants
 - Factory Rep's
 - Others
- Whenever possible, suppliers should provide training.
- Select trainees according to classification.
- Establish a department which will supply WRC services consisting of:
 - Mechanical
 - Electrical
 - Electronic
 - Carpentry and Metal
 - Communications
 - Lawn equipment

Action: to be studied for future project.

- Provide adequate storage and handling for the equipment and store spare parts in accessible locations.

- **Ensure proper training courses.**
 - **Select the most important subjects which deal with operation/maintenance. Each institute responsible.**
 - **Lay down a scheme for training in operations and maintenance for equipment on order.**
 - **Appoint suitable trainees and trainers.**
 - **Follow-up for effectiveness. Avoid use of sophisticated equipment by untrained personnel.**

Issue 7: CID Team Role

Problem Definition:

- Role of team is not clear.
- Terms of reference are very broad.

Recommended Responsibility:

Senior Researcher: (Dr. Roy Brooks)

- To establish routine meetings with each Inst. Director. Schedule should to be prepared by Dr. Abu-Zeid and Dr. R. Brooks.
- To assist in implementing the work plans regarding training abroad, in-country training, technical assistance and equipment.
- Introduce and clarify the role of TDY's to the institutes and participate in briefing and debriefing sessions.
- Provide technical assistance in his own field of expertise.
- After 3 months review his role with the Chairman and suggest modifications if necessary.
- Assist the Institutes Directors in developing the action memos.

Program and Administrative Officer: (Jim Hedrick)

- Prepare formats for action memos for use by directors and submit them to Chairman and USAID for approval.
- Contacts with the institutes are mainly through the project management and Chairman of WRC.

Manager of Systems Development/Manager of Analysis and Design: (Dr. Kay Seibert)

- Communicates mainly with the Chairman.
- After 3 months, review this role, the achievements and suggest modifications, if any.

Project Coordinator and Training Office: (Dr. Dan Sunada)

- Coordinates all administrative and financial responsibilities of the project.

Tech. Advisor: (Prof. E. V. Richardson).

- Assist Directors and Trainees in technical matters when they arrive in the U.S. in relation to program identification, TDY's and serves as a resource and tech. advisor in his field of experience.

Home Office Support Staff Administrative Assistant: (Dorothy Rein)

Staffing

Following are brief descriptions of the type of personnel the contractor is expected to provide.

Long-term Personnel: 99.5 person months

Senior Researcher (Team Leader)

The Senior Researcher will serve as the contractor's team leader in Egypt and will serve the WRC Chairman in expanding the scope and capabilities of the WRC. He/she will be assigned to the project for 33.5 months (to include annual, sick, and other authorized leave). His/her responsibilities will include but not be limited to the following:

- Assist the Chairman of the WRC in refining the functions and establishing research priorities of the eleven institutes.
- Assist the Chairman of the WRC and institute directors in formulating and reviewing training plans for personnel including short courses, M.Sc., and Ph.D. programs.
- Assist the chairman of the WRC and institute directors and trainees in the selection of courses of study and institutions that the trainee should attend.
- Work with the chairman of the WRC and institute directors in setting priorities for TDY needs and in coordinating TDY assistance.
- Assist the chairman of the WRC and institute directors in project evaluation and reporting.
- Provide technical assistance or conduct training in subject areas of particular expertise.
- Assist the chairman of the WRC in coordinating activities among consultants and other institutions in Egypt and elsewhere.

Program and Administrative Officer

The Program and Administrative Officer will be responsible to the Senior Researcher and the chairman of the WRC. He/she will be assigned to the project for 32.5 months (to include annual, sick, and other authorized leave). His/her responsibilities will include but not be limited to the following:

- Assist the Senior Researcher and the chairman of the WRC in formulating the TDY assistance program.
- Coordinate the setting of dates on which TDY personnel should be in Egypt and coordinate arrivals and departures.

- Expedite all paperwork associated with hiring, arrivals, departures, visas, and other aspects of employment of TDY personnel.
- Make arrangements and verify necessary language training, test scores, passports, tickets, visas, and like-items for persons going to the U.S. for training.
- Work with the Senior Researcher, the chairman of the WRC and institute directors, and the manager of system development in establishing price guidelines for commodity procurement to ensure that budgetary constraints are met and USAID, MPWWR, and GOE guidelines are adhered to.
- Offer technical assistance and/or conduct training in areas where particular qualifications exist.
- Work with local staff in expediting commodity procurement.
- Work with TDY staff in establishing equipment specifications.
- Assist the Senior Researcher and the Chairman of the WRC with project evaluation and reporting.

Work Plan Notes

Final work plans submission should reflect the following:

- Need for staff and training over life of project should be addressed.
- Relation to other institutes, and overlap identified. There will be a need to look at all work plans, harmonize.
- Overlap of TDY program and equipment.
- Conferences/workshops need to be defined.
- Review panel for final work plan presentation will be set up.
- Costs for TA and Training need to be harmonized to meet budgets requirements; adjustments will be made.
- Requests for additional staff clearly described, realistic numbers need to be defined, when needed.
- Not everyone should go to Ft. Collins.
- What's going to be accomplished by the project needs to be defined. Differentiate project work plan from institute plan.
- Terry Hardt and Jim Hedrick will look-up regulations on academic training (M.Sc.-Ph.D. all at one time) and age restrictions will be explored.
- Give names of TDY's and students for first year only, in the work plan. This will allow for flexibility in the future.
- Lists of Curriculum vitae for TDY consultants will be provided by CID to WRC.
- Gant chart of entire project should be included and developed for overall WRC project.
- Project review--informal, 6 months; formal, 1 yr.
- Collection of data in Egypt by students (for Ph.D.s) is permissible.
- Professional meetings for M.Sc. (1) and Ph.D.s (more than 1) during their program. Now Ph.D.s are limited to only one meeting. This number should be increased.
- Each Institute will submit revised draft work plans to the Chairman of WRC within three weeks of the end of this workshop (February 9, 1989).

APPENDIX C

EVALUATION RESULTS

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EVALUATION RESULTS

A. Workshop Goals

The goals of the workshop are listed below. Mark the number that most closely indicates how you fee each goal has been achieved. The scale is from 1 (low, goal not achieved) to 5 (high, goal achieved very well).

- | | 1 | 2 | 3 | 4 | 5 |
|----|--|---|---|--------------------|---|
| | Not Achieved | | | Achieved Very Well | |
| 1. | To exchange current project information that is essential to beginning the project (4.63) | | | | |
| 2. | To achieve understanding, agreement, and commitment to project goals and activities (4.83) | | | | |
| 3. | To provide an opportunity for the project team to become acquainted (4.89) | | | | |
| 4. | To agree on the management roles and responsibilities of the WRC, USAID, and CID/CSU (4.68) | | | | |
| 5. | To agree on procedures for managing the project (4.42) | | | | |
| 6. | To improve the ability to work together as a team (4.73) | | | | |
| 7. | To discuss and develop strategies for issues in project implementation that will affect the project (4.38) | | | | |
| 8. | To develop input for additions to current draft work plans (4.66) | | | | |

B. Opinions and Feedback

Please answer the following questions as thoughtfully as you can within the time. Your answers will help us plan other conferences in the future and will also indicate if there are concerns which need to be addressed as follow-up activities.

1. What do you think has been the primary benefit of this workshop?
 - Common understanding of the project--roles/responsibilities and major constraints
 - Improved understanding of roles and responsibilities

- Exchange information, agree on the management roles, and provide the opportunity for project team to get acquainted
- To achieve understanding of the project
- An opportunity for project team to be acquainted
- To agree on the management roles and responsibilities of the WRC, USAID, and CID/CSU
- Drawing the key persons out of their too-busy daily schedules to gather together and discuss major issues about the project before it starts
- Achievement of a very successful start-up project
- Good understanding of the institute's activities
- Good understanding of the project items which will help in preparing an applicable work plan
- It is very useful as it gave the chance to all directors to get acquainted with other institute projects and difficulties facing them
- Confirming working relationships
- Objectives 2,4,7 (see above)
- Very good
- All participants benefitted, institute directors particularly
- More understanding of the roles and responsibilities
- Directors' knowledge increased of overall project and opportunity for contractor team to relate to directors
- Common understanding
- To be acquainted with whole project
- Become acquainted and improve the status to work as a team
- Setting the objectives, work plan of each institute in a proper way. Each institute knows better of other's work plan

- Gave a chance to know points which were not clear in the document

2. What workshop activity could have been done better?

- All activities have been done efficiently in this time
- Develop more defined strategies for easiest implementation
- Session 6 - Discussion of Issues
- All are OK
- The weakest area was the work plan by institutes
- None
- More clear directions for reporting on individual institute work plans.
- The limit of the budget for each team
- Objective 4 - to agree on management roles and responsibilities of the WRC, USAID, and CID/CSU
- Good
- Nothing--all activities were very good
- All activities OK
- None--Note: Timing could be a little bit more controlled
- The workshop schedule was rather too tight. Perhaps one of two more tours would have been appreciable.
- Procedures for managing the project
- N/A
- None
- Team Work--Team building
- Work Plan Review

3. Do you believe there are unresolved issues that should be dealt with in follow-up activities? What are they, and should be done about them?

- All issues can be resolved if tasks concluded and recommendations will be implemented
- No
- No, any unresolved problem can be solved if discussed by a team in a proper way
- CID/CSU Role, responsibilities, relationships
- Relation of TA team/CSU
- Specifics on mid-term review
- Good--need workshop approximately 3-4 weeks before next annual work plan is developed (about Oct-Nov.)
- Follow-up issues and reconsideration of management roles
- Revision of work plans according to the budget limits
- No
- No, not any significant issues are noticeable at the conclusion
- Refine work plans as agreed
- The time is very short for this big project. It should be prolonged for a longer period
- Not much.

- There are minor unresolved issues, i.e. overlap of TDY, equipment procurement
 - Major issues are resolved theoretically, but may meet some difficulties during implementation, e.g. arrangements of orientation programs and TOEFL classes
4. What comments do you have about the workshop arrangements and accommodations.
- Just informing the participant before the workshop with enough time
 - Excellent
 - Very good
 - Very well
 - Arrangements well-handled, accommodations very good-- problems with phones
 - No comments, it is very good
 - Very satisfactory
 - Excellent arrangements
 - Excellent
 - Excellent
 - Good facilities and reasonable cost. Food in hotel and city was good
 - Good
 - None
 - Reasonable
 - Accommodations/arrangements great, although penthouse was not comfortable or adequate. Nairy worked extremely hard--Thanks for the support.
 - Very good
 - Adequate
 - Very comfortable accommodation. A lot of food.

5. What final comments do you have for the workshop facilitators on their performance?

- Excellent performance, it cannot be really better
- Excellent
- You did the best that we may expect. We always hope you (have) good luck
- Very well
- Excellent organization, getting closure on action needed. Superb. Relationship with trainees commendable.
- Excellent
- Have done an excellent job and should be congratulated
- Make a good presentation--good leading of discussions--an excellent job
- Excellent
- Excellent
- Team performed a very good job and I am very satisfied with their performance
- Very good
- Thanks to them for the hard work they've done with us
- At times, you assumed a project management role rather than a facilitator
- Extremely well done--please come back.