

Attachment A

CONTINUING IMPLEMENTATION OF ECONOMIC GROWTH TRAINING STATEMENT OF WORK

April 21, 2004

I. BACKGROUND

USAID's overseas missions continue to require skilled technical staff able to manage a diverse portfolio of economic growth activities. Lack of technical staff is an Agency-wide problem, due to the overall decline in personnel levels during the 1990s and staff retirements during the past several years. The problem has been particularly acute in the area of Economic Growth (EG) officers, defined as private enterprise officers (backstop 21), economists (backstop 11), and agricultural development officers (backstop 10). Between 1992 and 2000, these three backstops experienced a 60% decrease due to retirement and other factors. At the end of 2003, 70 officers in the three backstops filled positions Agency-wide. As a result of fewer staff in these and other technical backstops, missions have continued to redefine jobs as generalist positions and/or to hire personal service contractors (PSCs) to fill technical positions.

Beginning in 2000, the Agency began recruiting direct-hire foreign service officers (New Entry Professionals, NEPs) in the Economic Growth backstops. Since then, USAID has hired 53 Economic Growth NEPs: 22 private sector officers, nine economists, and 22 agriculture officers. Nonetheless, it shall take time to restore the mid-ranks of the technical and other backstops. In the most recent assignment process, USAID had 169 eligible bidders in all backstops for 265 vacancy listings.

At the same time, tight budgets, particularly a shortage of operating expense funds, have limited USAID's investment in training, including technical training. In November 2000, the Agency, under the auspices of the Global Bureau's Center for Economic Growth and Agricultural Development, now the Bureau for Economic Growth, Agriculture, and Trade (EGAT), launched a new training effort to strengthen the skills of its economic growth staff. The overview course, the Economic Growth Officers' Training Course, is the key element of the Economic Growth Technical Training Program. The training program also includes the development and delivery of two- to three-day in-depth technical courses. Both the overview and the in-depth courses address the technical competency areas for economic growth officers: Economic Policy and Institutions; Legal and Institutional Reform; Financial Sector; Privatization; Micro-enterprise Development; Agriculture and Agribusiness; Trade and Investment; and Enterprise Development/Competitiveness.

The primary objective of this training is to update and upgrade the technical skills of USAID's economic growth officers. Increasingly, the training, particularly the overview, also targets a broader group of program and project development officers and general development officers who manage economic growth portfolios in the field. Since the inception of the training program, approximately 875 participants have taken part in nine overview courses and 15 in-depth modules, including six international trade (five with supplemental funding from the Trade

project), three financial sector reform, two legal and institutional reform, two micro-enterprise development, one agriculture, and one macroeconomics module.

EGAT proposes to expand the Economic Growth Technical Training Program, now in its fourth year of implementation, to include the additional training outlined below. This task order shall be incrementally funded over the next three fiscal years 2004, 2005, and 2006. The training activities outlined below are in line with past training efforts. As the training needs of the Agency change during the three-year life of this project, adjustment and adaptation of the training schedule, number, and frequency of courses may occur within the overall level of effort of the task order. These adjustments shall be adopted by mutual agreement of USAID and the Contractor.

II. OBJECTIVES

In each of the three years of this task order, the objectives of the EG Technical Training Program are to: (a) further refine and update the overview course curriculum and related teaching materials and organize and deliver an average of two U.S.-based sessions of the overview training course and one overseas if co-funding becomes available, and (b) design, organize, and deliver a minimum of one new specialized in-depth module of two to three days (unless a longer module is required and is mutually agreed upon by USAID and the Contractor) and between four and seven repeat modules and develop certification exams for the modules. Related to task (a), as funding permits and in consultation with EGAT/EG, the Contractor shall also develop and deliver a higher-level Economic Growth seminar for participants who have taken the EG overview course and/or shorter (2.5 hours to one day) executive EG seminar(s) for USAID's senior managers. Related to task (b), the Contractor shall adapt approximately two in-depth modules each year to a distance learning format with a certification exam.

In its first year, with FY 2004 funding, it is anticipated that the task order shall initially finance two or three overview courses: two US-based and one overseas if co-funding becomes available. It is also expected that the task order shall provide funding for one new in-depth module (probably privatization); repeat sessions of the previously developed in-depth modules; and conversion of two modules to distance learning. Depending on timing and funding, an additional two-week session of four in-depth modules may take place, or a one-week higher-level EG seminar in combination with two in-depth courses may be offered. As required, shorter executive seminars may also take place.

Each overview session shall train approximately 35-40 USAID economic growth officers, while the in-depth modules shall each train approximately 25-35 officers. The higher-level seminar shall target approximately 30 officers. The executive seminar shall target between 10 and 20 senior managers. Training participants shall include direct hire, foreign service national (FSN), and personal services contractor (PSC) employees, as well as officers from other backstops and other U.S. Government agencies, as needs dictate and as space permits. The Contractor shall ensure that training participants have ready access to all training materials for all courses through the Agency's intranet and on computer disks.

III. TASKS

Under the new task order, the Contractor shall carry out the following tasks:

A. Overview course: The Contractor shall continue to refine and implement the core curriculum with teaching materials for the Economic Growth Officers' Training Course over the next three years, with the goal of reaching all of the Agency's economic growth officers as well as a broad cross-section of other USAID officers who oversee economic growth activities. As funding permits and Agency needs dictate, the Contractor shall develop a higher-level economic growth seminar for participants who have already taken the overview course and shall develop short (2.5 hour to one day) executive summary courses for senior managers. The purpose of the higher-level course shall be to discuss best practices and lessons learned and to explore future economic growth strategies for missions. The executive summary courses shall provide senior Agency managers with the information needed to provide strategic direction to mission economic growth programs.

Based on the success of the initial versions of this course offered in fiscal years 2000 through 2004, and working to the extent possible with regional bureaus and missions to ensure adequate funding, EGAT plans to offer two US-based and one co-funded overseas session of the core overview course, (each followed by a second week of training with two in-depth modules as described below) in fiscal years 2005, 2006, and 2007. This course provides an overview of the major issues that USAID's economic growth officers are expected to understand and apply in their work in USAID target countries. EGAT shall offer this basic course for the next three years, longer if necessary, in order to ensure 100% participation of all economic growth officers and to afford course participation to those officers in other backstops who are developing mission strategies and managing or overseeing economic growth portfolios. The Agency's Economic Growth Sector Council, which participated in the development of the course curriculum and reviewed and endorsed the curriculum, recommends the course for all economic growth officers, including all New Entry Professionals (NEPs) in the relevant backstops. Successful course completion shall be noted on participants' permanent files and EGAT is developing a database of all course participants in the Agency.

The primary objective of the EG overview course curriculum is to ensure that all of USAID's economic growth officers have a solid and common foundation of information on the key economic growth issues in USAID target countries. By the end of the course, the participants should have an excellent understanding of the critical economic growth themes and be able to apply this knowledge in the field. They should also know how and where to access technical assistance and further information, as required, for each of the major economic growth areas.

The Contractor, in close collaboration with EGAT and the Economic Growth Sector Council, shall refine and update the core curriculum and related training materials, based on USAID input and the evaluations of previous course sessions. The curriculum should be structured for a one-week (5.5 days) training program, beginning on Sunday afternoon. The audience includes USAID's economic growth officers, including both new entrants and experienced officers.

The core curriculum focuses on the key economic growth areas. These include:

1. Economic Policy and Institutions
2. Legal and Institutional Reform
3. Financial Sector
4. Privatization
5. Micro-enterprise Development
6. Agriculture and Agribusiness
7. Trade and Investment
8. Enterprise Development/Competitiveness

USAID has developed a skills matrix for economic growth officers, detailing the specific themes that should be understood in each of the economic growth technical competencies (included as an attachment to this scope of work). The Contractor shall focus the refinement and continued development of the course curricula and the related training materials on strengthening the participants' understanding and knowledge of these specific technical competencies. Course curricula and materials used to date shall be made available to potential bidders on this task order as a CD. Approximately one-half day shall be devoted to each of these technical areas, incorporating both theory (understanding of the critical issues and themes) and practice (how to design and implement specific initiatives in these areas). The remainder of the week shall be devoted to introductory speakers and a case study prepared in small groups to develop a country economic growth strategy.

In refining and updating the curriculum, the Contractor shall bear in mind the following:

1. The participants shall range from new entrants to the Agency to very experienced economic growth officers. Therefore, the curriculum shall be structured to ensure sharing of information among USAID's economic growth officers and build on the knowledge of the Agency's most experienced officers.
2. The curriculum shall incorporate practical and hands-on case studies and exercises that shall strengthen the participants' understanding and mastery of the key economic growth areas. These exercises and case studies shall be designed to enable the participants to apply what has been discussed in the course. They shall challenge the participants – both new and experienced officers – and, equally important, they shall be designed to help create a spirit of camaraderie and team effort among the Agency's economic growth officers.
3. As part of USAID's ongoing knowledge management process, the Contractor shall integrate best practices and lessons learned from the Annual Reviews of ongoing USAID economic growth activities under SEGIR and other mechanisms.

Higher-Level and Executive Seminar(s): New in this task order is EGAT's proposal to provide funding for an advanced seminar for economic growth officers who have already taken the EG overview course and executive seminars for the Agency's senior managers. The week-long advanced seminar shall explore emerging issues, lessons learned, best practices, and new

development strategies for the future. The executive seminars shall be greatly abbreviated (2.5 hours to one day in length) to provide key information related to economic growth programs for the Agency's most senior managers. The development of these seminars shall be at USAID's option, based on Agency priorities and in consultation with senior management.

B. In-depth Modules: The Contractor shall design and deliver one new in-depth technical module of two to three days in each of the three years of the contract and refine/update (which will include current state-of-the-art information), organize, and deliver between four and seven repeat specialized modules of two or three days every year. The Contractor shall develop (1) a testing mechanism for the in-depth modules geared toward certifying the participant's competence in the subject matter and (2) a system of converting the in-depth modules to distance learning modules. These modules will be developed for web-based platforms that are compatible with agency systems. If it is determined that low bandwidth modalities are required by a sufficient number of missions, then that option will be developed as an element of implementation.

The in-depth specialized modules allow officers to gain more detailed and in-depth knowledge in the competency areas. USAID intends to develop and deliver one new or substantially revised module each year over the next three years, and to offer repeat sessions each year of previously developed modules as demand and funding permit. In order to ensure that all modules are available on a timely basis, USAID contemplates one two-week session each year of only in-depth modules (thus four each time). These specialized training modules shall enable officers to upgrade and deepen their technical skills over the course of their careers. This new expansion of the training program shall also begin testing participants following the in-depth training in order to certify competency.

To date, USAID has developed in-depth modules in the following competency areas:

- Micro-enterprise Development
- Agriculture and Agribusiness
- International Trade
- Financial Sector
- Legal and Institutional Reform
- Macroeconomic Policy

In addition, EGAT's Office of Development Credit has developed and implemented multiple sessions of an in-depth course for the Development Credit Authority.

Course evaluations and in-house technical resources have guided in-depth course development. The primary objective of the in-depth modules is to ensure that all USAID's economic growth officers have a solid and common understanding of the key concepts, issues, and institutions related to the specific in-depth area. To date, EGAT has offered six sessions of the International Trade course, three of Financial Sector Reform, two each of the Micro-enterprise and Legal and Institutional Reform, and one each of the Agriculture and Macroeconomic Policy mini-courses. There remains a large cadre of USAID personnel who could benefit from this in-depth technical training.

Thus, this statement of work addresses the need for further training by providing financing for four to seven repeat modules each year, in addition to the one new or substantially revised module. Specifically, the Contractor shall:

1. design and deliver a new in-depth course in the remaining area of competency, privatization, during the first year of the task order.
2. in the second and third years, design and deliver a new course each year in a relevant EG subject matter to be determined or significantly redesign one of the older modules.
3. as funding permits, revise and deliver approximately four to seven repeat in-depth modules.
4. design computer-based tests for each of the in-depth modules to be used as a basis for competency certification. The Contractor shall outline in its proposal the methodology for developing self-tests for each of the modules.
5. convert existing and new in-depth modules to self-taught computerized distance learning modules. The Contractor shall plan to convert approximately two modules a year and shall outline in its proposal the means for converting the modules into distance learning tools with a self-testing mechanism. The Contractor shall also propose how USAID can minimize costs for this component while at the same time expanding the impact of the training, particularly for officers overseas. Distance learning shall enable officers to upgrade and deepen their technical skills even when they are unable to attend on-site training courses and also permits officers to refresh or review their technical skills periodically at their convenience. In developing this component, the Contractor shall coordinate and cooperate with other distance learning activities in the EGAT bureau and Agency (contacts to be provided by the CTO).

C. Program Implementation: The Contractor shall organize and deliver the Economic Growth Training Program, based on the guidance of USAID technical officers and the Economic Growth Sector Council and with USAID presenters, as available. The Contractor shall coordinate closely with EGAT regarding timing of course delivery.

Under the first year of this task order, USAID intends to offer up to three one-week Economic Officers' Overview Training Courses, two in the U.S. and, with regional or mission funds for co-financing, a third overseas. If this co-funding does not become available, EGAT reserves the right to reorient and redirect training funds to additional domestic courses based on the needs of the Agency. The U.S.-based training courses shall take place at an off-site location in the Washington area, preferably about one to two hours away from the metropolitan area. Approximately 35-40 economic growth officers shall participate in each of these training courses. The Contractor shall facilitate the Economic Growth Officers' Overview Training Course and present each of the modules in the core curriculum. The Training Program should involve the active participation of USAID's economic growth officers as presenters when feasible.

Under this task order, USAID intends to offer two in-depth modules in conjunction with the overview course each time it is offered. These modules shall take place in the week immediately following the EG overview course, and shall train approximately 25-35 economic growth officers each. The U.S.-based modules shall take place in the immediate Washington D.C. vicinity. The Contractor shall facilitate and/or present the in-depth modules with the active participation of USAID's economic growth officers as presenters, as they are available. If funding permits, and particularly if the overseas course does not take place, the Contractor shall organize and implement a two-week training session of four in-depth modules in the immediate Washington D.C. area, or at the discretion of EGAT, a combination of modules and advanced and/or executive economic growth seminar(s).

The Contractor shall organize and manage the logistics associated with all the training activities, including the following tasks:

1. Identify and make arrangements for a suitable location for the U.S. training courses. The site(s) must be willing to provide accommodations for USAID staff within the U.S. government per diem rate for that location. Before signing an agreement, the contractor shall obtain the approval of the EGAT Cognizant Technical Officer (CTO) on the final site selection. For any overseas training, the contractor shall coordinate with EGAT and with the appropriate field office.
2. Assist EGAT in developing invitations and questionnaires for USAID's economic growth officers to be sent via email and posted on the EGAT's website.
3. Maintain a registration list for the training program participants. The Contractor shall submit an up-dated list of the participants to the CTO on a regular basis (at least every two weeks during the two months preceding the training program). For any overseas training, the Contractor shall coordinate with the appropriate field office.
4. Assist EGAT in communicating with the participants regarding: registration for the training program, reservations, transportation to the site; and the agenda. Assist the training program participants with logistical arrangements, including rooms, meals, travel to the site and other necessary arrangements. For any overseas training, the Contractor shall coordinate with the appropriate field office. The Contractor shall not be responsible for paying for the lodging for the USAID participants. However, the Contractor shall provide lunch and coffee breaks to the participants at the training site facility and the cost shall be included in its budget for this activity.
5. Work in close collaboration with technical teams in EGAT and the Economic Growth Sector Council to develop the agenda and curricula for new Training Modules and the advanced and executive seminar(s); review and revise the agenda and curricula for the Overview Course and repeat in-depth modules; and develop distance learning modules. The Contractor shall submit and obtain the approval of the final agenda/curricula from the EGAT/CTO.

6. Develop and assemble all of the materials and reading lists for the Economic Growth Training Program, based on the key areas in the core curriculum (refer to the Skills Matrix for Economic Growth). Provide electronic versions of the curricula and applicable materials for all courses to USAID for posting on EGAT's website.
7. Provide any required presentation equipment necessary for the successful completion of the Training Program, including the distance learning modules, such as LCD projectors, overhead projectors, video cameras, and other equipment as required, as well as approximately five laptop computers for participant use in preparation of their week-long group projects. For any overseas training, the contractor shall coordinate with the appropriate field office.
8. Identify a speaker or speakers, in collaboration with and with the approval of EGAT, for the Training Program's opening sessions. Handle all of the necessary logistical arrangements for the speakers, including payment of honoraria, if any, for outside speakers.
9. Design and/or revise and administer: (a) self-test examinations for the in-depth modules to certify that participants have acquired core skills; (b) a Self-assessment Questionnaire prior to the course to assess the level of technical expertise of prospective participants and in turn allow the latter to volunteer their own expertise for course sessions; and (c) an Evaluation Form that shall enable participants to provide constructive feedback on course content and delivery. The Contractor shall analyze and present the results of the self-test certification exams, the self-assessments, and the evaluations to EGAT. As determined by the EGAT/CTO, follow up with past participants to get their input into the usefulness of the courses and recommendations for changes six to 12 months after the course takes place.
10. Following course completion, prepare a memorandum to the EGAT/CTO that summarizes the results of the training. The memorandum is intended to ensure that lessons learned from each successive offering of the course are incorporated into subsequent sessions. The memorandum should detail: (i) the results of the Participant Evaluations discussed in Point 9 above; (ii) a summary of what worked well or did not work well, in terms of speakers, methodologies and materials; and (iii) specific recommendations for strengthening and improving the course in the future.

D. Ensure Ready Access to All Training Materials via the Agency's Intranet

USAID wants to ensure that all of its economic growth officers have ready access to the training materials following each course and can readily adapt them to their specific needs. At the conclusion of each training course, the Contractor shall ensure that the core curriculum for each course and its related training materials are posted on the EGAT web site, (except for copyrighted books and articles, which would be posted instead as a reading list). In addition, the Contractor shall make available on the EGAT web site any distance learning modules that are developed under this task order.

E. Summary Deliverables:

In each of the three years of the task order, the Contractor shall deliver:

- 2 U.S.-based overview courses
- 1 new in-depth module
- 3 repeat in-depth modules
- 2 conversions of in-depth modules to distance learning

Should co-funding from regional bureaus and/or overseas missions become available, the Contractor shall also deliver:

- 1 overseas-based overview course
- 2 overseas-based in-depth modules

Should co-funding for the overseas courses not become available, the Contractor, in consultation with USAID, shall deliver additional Washington-based in-depth modules and/or higher-level and executive seminars, subject to availability of funding.

IV. ILLUSTRATIVE LEVEL OF EFFORT

For each U.S. overview course, the approximate contractor level of effort (LOE) is:

- 10 days of a conference co-coordinator, level 2 business and finance specialist;
- 20 days of a conference co-coordinator/materials, level 2 business and finance specialist;
- 10 days of a conference facilitator, level 1 business and finance specialist;
- 30 days of technical expert trainers, level 1 business and finance specialists; and
- 5 days of a conference management specialist, level 2, to handle conference logistics.

For the overseas overview course, the approximate contractor LOE is:

- 20 days of a conference coordinator, level 1 business and finance specialist;
- 10 days of a conference facilitator, level 1 business and finance specialist;
- 30 days of technical expert trainers, level 1 business and finance specialists; and
- 5 days of a U.S.-based conference management specialist, level 2, to handle conference logistics.

For each new in-depth module, the approximate contractor LOE is:

- 20 person-days of conference coordination;
- 10 person-days of conference facilitation;
- 50 person-days of technical experts; and
- 5 person-days to handle seminar logistics.

For each repeat in-depth module, the approximate contractor LOE is:

- 10 person-days of conference coordination;
- 10 person-days of conference facilitation;
- 25 person-days of technical experts; and
- 5 person-days to handle seminar logistics.

For each distance-learning module developed, the approximate contractor LOE is:

- 30 person-days of technical expertise, level 1 business and finance specialist;
- 10 person days of conference facilitation, level 1 business and finance specialist; and

10 days of audio-visual and filming technical experts, level 1.

V. EVALUATION CRITERIA

The technical evaluation committee shall use the following technical criteria to evaluate the proposals.

Technical approach (50 points)

- Demonstrated comprehensive and effective approach to technical training, which reflects a broad and deep understanding of the eight specific Economic Growth skill areas (Economic Policy and Institutions, Legal and Institutional Reform, Financial Sector, Privatization, Micro-enterprise Development, Agriculture and Agribusiness, Trade and Investment, and Enterprise Development/ Competitiveness), and the interrelationship between these skill areas. (30 of 50 points)
- Demonstrated ability to develop distance-learning, computer-based training courses using web-based platforms that are compatible with agency systems and accessible to USAID missions worldwide. (10 of 50 points)
- Experienced and capable course coordination, including management of course logistics, preparation of training materials, course evaluation, reporting, and accounting management systems. (10 of 50 points)

Key personnel (40 points)

- Capable course facilitator with broad and deep technical and training expertise. (20 of 40 points)
- Two proposed key trainers/EG practitioners with demonstrated professional capabilities, necessary educational qualifications and training experience in the eight technical competency areas described in the Private Enterprise Officer Skills Matrix (see Attachment C). (10 points each for a subtotal of 20).

Past Performance (10 points)

In addition to Section F.3.(a)(5), the proposal should cite pertinent examples of the firm's training and technical assistance activities undertaken in the economic growth technical skills areas and provide the names of recent contacts, including those in USAID missions, for follow-up on performance appraisal.

TOTAL 100 points

VI. TERM OF PERFORMANCE

The Contractor shall begin work on this task order as soon as it has been fully executed. It is anticipated that all work shall be completed not later than August 10, 2007.

(End of Attachment A)