

# EXTERNAL EVALUATION OF THE INSTITUTE FOR DEVELOPMENT (ID)

**Norwegian Mission Alliance in Bolivia**

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## Introduction

The Institute for Development ID is going through a very special moment in its historical development process. Despite its recent nomination, it has been working for several years in the field of training human resources and it is part of Norwegian Mission Alliance in Bolivia (MAN-B) of which it derives its basic mission and sense.

Its current structure is the result of an articulation of different initiatives based on the results of the external evaluation to which it was subject in March 2003, as well as of the internal evaluation performed by MAN-B itself.

Because of the need to incorporate new capacities besides consolidation of existing ones and the requirement of an ongoing quality improvement process in ID interventions, **there is a series of new challenges which the institution must be willing to overcome through a process of reflection and future-looking planning.**

This evaluation of the ID was performed by external consultants at the request of Norwegian Mission Alliance – MAN, aimed at developing a culture of progressive incorporation of the attributes of alternative education organisations in the field of development, with a diaconal approach as its central characteristic.

The starting point of the external evaluation was the acknowledgment of the particularities of the evaluated institutional sphere and of the institutional development times and rhythms. Besides, the evaluators became fully aware of the consequences of their opinions in response to the annexed terms of reference.

**Therefore, we have made an attempt for the institutional diagnostic to go beyond functional dimensions and cyclical appreciations, as this might hamper an understanding of the whole institutional setting and to take into account a longer-term and sustainable time horizon in response to MAN-B's development objective.**

The resulting conclusions and recommendations point to a reflection and analysis of MAN-B and the ID for them to find ways for a true institutional improvement, giving a transcendent sense and direction to daily activities. This report tries to be a contribution both for interpretation and improvement of the Institution.

For performing this task, we had access to all requested information. Authorities of the institution, its teaching personnel and students displayed an open and pleasant attitude of collaboration, which greatly facilitated the work. Interviews were conducted with municipal authorities, authorities of MAN-B, coordinators of the different work areas of MAN-B, authorities of institutions with which the ID coordinates its activities and we visited the municipalities in which the ID has worked and is working. On all these moments, we underscored the importance of understanding the nature of the evaluation process and the intention of making useful contributions to ensure success of the evaluation.

This report consists of eight chapters.

The first reviews the institutional construction process of the ID. Next, there is an analysis of the internal and external context in which the ID operates and which helps to explain certain phenomena.

The second chapter covers an analysis of the ID's structure starting from the internal organisation of MAN-B and the relationship between the different areas and projects. An explanation is also given of its specific objectives, its use of planning instruments for the training it offers, the teaching team in charge of the training and the profile of the students who participate in the training courses and who graduate as Assistant Technicians in Development, as well as information on drop-out rates.

The third chapter analyses the content of the Training Study Plan and content.

The fourth chapter analyses the strategies to work with the intervention areas of MAN-B and with other municipalities, and the degree to which this is contributing to the organisational strengthening promoted by the areas of MAN-B.

The fifth chapter analyses the Plan 2004-2007.

The sixth chapter analyses information management issues.

The seventh chapter contains an accounting – financial analysis.

The eighth chapter contains an analysis of sustainability of the ID.

And the last chapter contains the conclusions and recommendations.

## **1. The institutional construction process.**

### **1.2. Background.**

The ID was born in 1998 in response to representatives of MAN-B and Norwegian missionaries being anxious about Bolivia having a diaconal and development institute, which would generate revenues for other Mission projects. In this sense, an external feasibility and marketing study was carried out which gave rise to an intervention strategy. This is how the Diaconal Institute of Norwegian Mission Alliance was born, called the IDMAN (*Instituto Diaconal de Misión Alianza de Noruega*), which had the following objective: “trained institutions and social stakeholders apply the acquired knowledge and skills in sustainable development processes in their municipalities from a diaconal perspective”.

In 2002, the IDMAN was acknowledged by the Bolivian Ministry of Education through Administrative Resolution 09/02 dated 17 July, as an entity that provides Alternative Education.

In 2003, a first external evaluation is made. One of the recommendations of this evaluation is that the IDMAN must define what type of institution it wants to, should or can be in accordance with the socio-political context of Bolivia: whether it wants to be associated with the social work of MAN-B or whether it considers itself to be a

training entity in diaconia, or maybe an Institute that trains assistant technicians in development with a diaconal vocation.

As from 2004 and putting into practice the recommendations of the external evaluation carried out in 2003, as well as the recommendations of internal evaluations, the institute defined its identity as the Institute for Development or ID, which centres on training Assistant Technicians in Sustainable Development, in rural and urban municipalities. It also defines its vision, mission, values and development objective. This is the identity the Institute still has today.

The headquarters of Norwegian Mission Alliance in Oslo, NMA, the entity funding the ID, require periodic evaluations to ensure success of the ID. In this sense, it was agreed to perform another external evaluation in 2007.

This evaluation of the ID (2007) starts from the acknowledgment of the institution's particularities. Although it is a private institute for non-formal, alternative education, it has a series of features that distinguish it from the rest of the institutions that provide this type of training. One of the most important differences is that it is part of MAN-B, with which it has an organic relationship.

**Hence, we consider it is necessary to clarify these aspects prior to presentation of the evaluation of the institute and its functions.**

## **1.2. The national context in which the ID operates.**

Until some time ago, the Bolivian State was characterised by development activities being directed by the central government.

In the last 15 years, Bolivia has introduced a series of state reforms through the implementation of laws, such as Law 1551 – the People's Participation Law – that divides the country into 311 (at the moment 327) municipalities and that transfers 20% of the National Treasury revenues to the municipalities by means of a formula calculated on the basis of the number of inhabitants<sup>1</sup>. Law 1551 somehow was the State's answer to the citizens' demand for participation.

The cultural diversity of Bolivia, which is reflected in different groups, indigenous territories, peasant unions, neighbourhood councils and others was acknowledged by the State through this People's Participation Law. These organisations became entities with legal capacity and became Territorial Grassroots Organisations (OTBs, in Spanish). These organisations materialise civil society participation in development planning, they channel people's demands to the Municipal Government and they exercise social control on local development policies and actions.

In specific OTB meetings at the level of municipal districts, the members of the Surveillance Committee are elected. In each municipality, this Committee is

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<sup>1</sup> These resources are augmented with the distribution of funds from the Debt Alleviation Initiative (HIPC I and II) of which Bolivia is a beneficiary because of its being a highly indebted poor country. According to this initiative, the amounts for repaying the principal and interests in some multilateral loans must be used for development policies, in exchange for which these loans are pardoned. Law N° 2235 of 1991, called the National Dialogue Law, sets forth a mechanism for distributing these funds to the municipalities.

responsible for exercising social control of the municipal government's actions, use of the people's participation funds, progress of the Municipal Development Plan (PDM, in Spanish) that is prepared every five years and execution of the projects considered in the Annual Operational Plans (POA), which are prepared in a participatory manner.

Both in the PDMs and the POAs, the population and municipal technicians together determine and prioritise required investments. The People's Participation Law transfers different responsibilities to the municipalities which before were assumed by the national level; e.g. the construction and maintenance of infrastructure for the education and health sectors.

**The new structural, political and administrative framework enables a better compliance of the policies of MAN-B and the ID, as local governments are considered adequate spaces for deepening democracy through more participation and contact between the State and civil society.**

### **1.3. The institutional context of the ID.**

Even though its activities are developed in different fields, the immediate context of the ID is:

- a) Municipalities of La Paz in which MAN-B does not intervene with other programmes; and with which an agreement is signed for training human resources.
- b) The intervention areas of MAN-B, covering different zones in the municipalities of El Alto, Caranavi, Combaya and Sorata of the department of La Paz
- c) Organisations requiring consultancy services of the ID in the field of participatory planning and staff training.

In the department of La Paz, there are but few institutions that offer the type of training the ID offers in relation to local development.

The existing institutions do not work on the basis of the diaconal values of the ID, they do not offer training events in rural municipalities and so they do not enable access to the courses of the students who live in remote communities like the ID does, and – as opposed to the ID – they do not use the Aymará language either for ensuring a better understanding of the training content.

In the intervention areas of MAN-B, part of the strategy focuses on Organisational Strengthening by training leaders or grassroots organisations and by providing information on different social change laws. It is precisely in this activity that the work areas of MAN-B eventually request intervention of the ID.

As regards organisations that require the ID's services for consultancies related to planning, evaluation and other professional activities, some specific initial projects were carried out. Nonetheless, further efforts are required in this field.

## **2. Organisational Structure.**

## **2.1. Structure of MAN-B and its relationship with the ID.**

The institutional structure is the way in which the different areas of an organisation are integrated, the functioning of which enables attainment of the organisation's objectives.

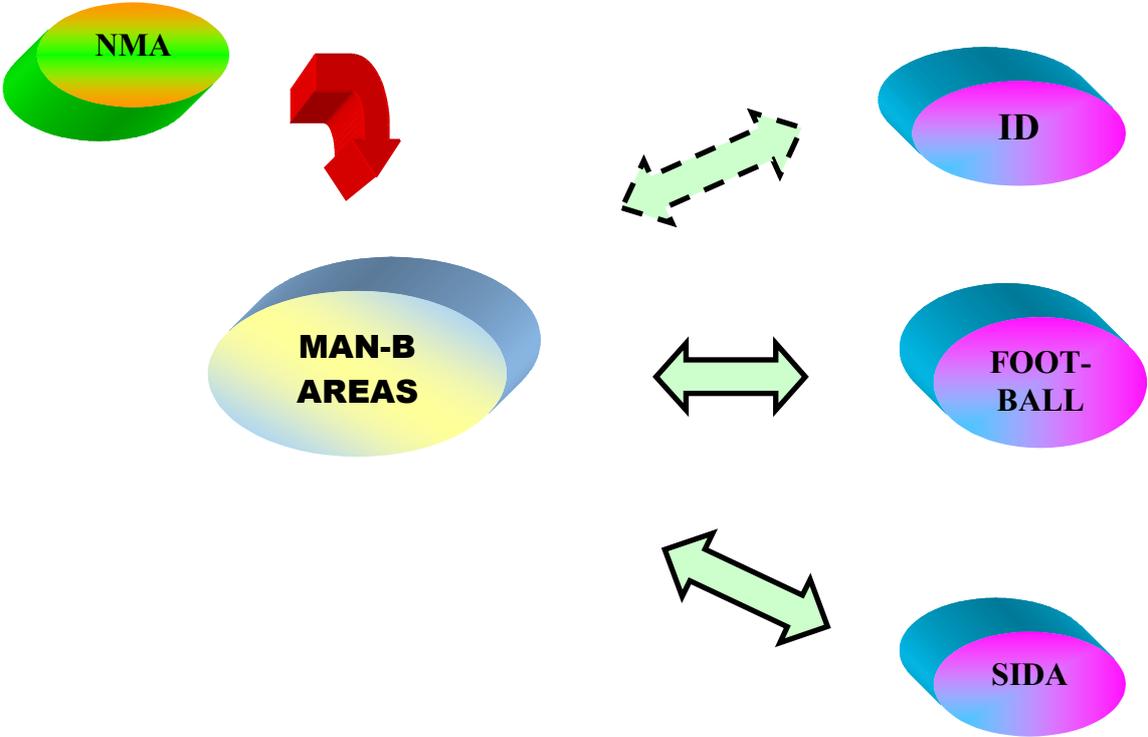
MAN-B has a structure in which the ID is situated as part of a group of projects.

Albeit that the organisational structure of MAN-B considers coordination levels, these are subordinated to a decentralisation dynamic. This means that at the operational level, the intervention areas and sectoral projects take their decisions almost autonomously.

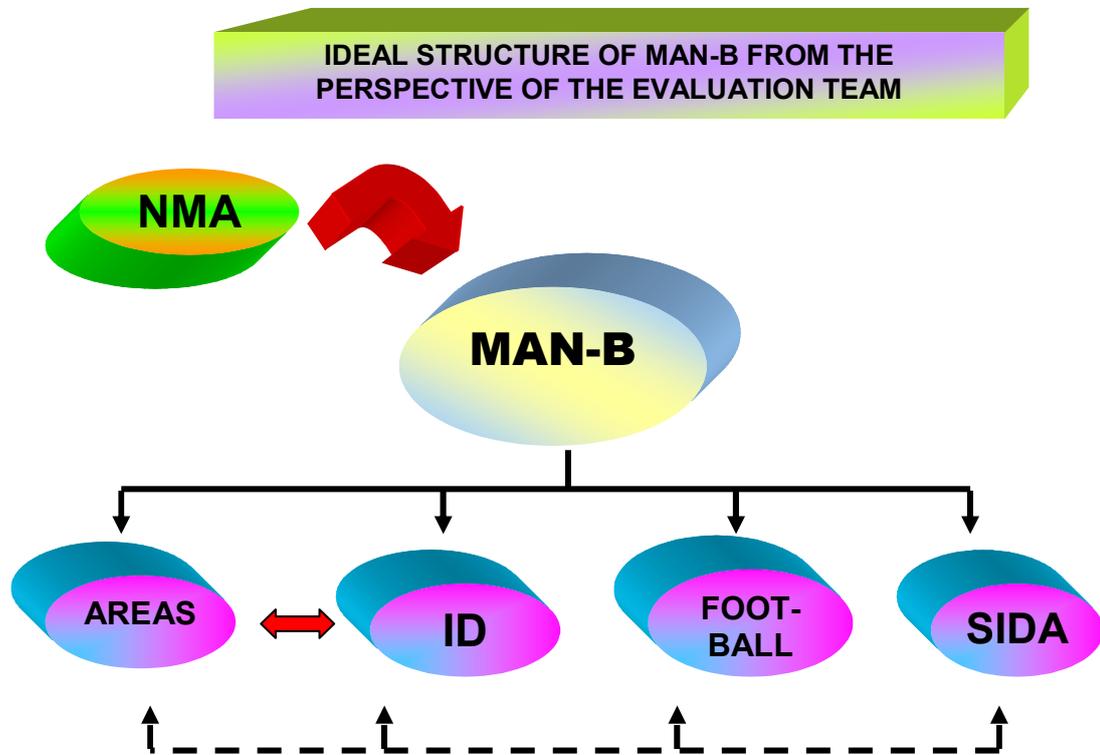
Within this framework, there is not a clear organic relationship of the ID with the other sectors and work areas of MAN-B. This becomes clear in the fact that the ID does not participate in, for example, the activity planning process of the organisational strengthening projects of the areas. In this sense, the ID has an "external relationship" with the intervention areas, which is rather a relationship of the ID "selling training services" to the work areas.

The evaluation team saw this lack of coordination in practice and reached this conclusion also on the basis of the interviews with personnel of MAN-B and the ID. Hence, this clearly shows a lack of institutional integration. The graph below mirrors this impression, which was confirmed in the two presentations of the team on its preliminary progress with the evaluation.

**REALITY OF THE ORGANISATIONAL STRUCTURE OF MAN-B  
FROM THE PERSPECTIVE OF THE EVALUATION TEAM**



The evaluation team considers more organic integration of the ID is needed in the organisational practice of MAN-B with a direct coordination relationship between its areas and the other projects, as can be seen in the following diagram:



## 2.2. Structure of the ID.

With the general organic chart of MAN-B, the ID is one of the sectoral projects funded by NMA-Oslo, which means that there is only an administrative-financial relationship as MAN-B administers the economic resources sent by Norwegian Alliance, NMA.

In turn, the ID has an internal structure in which three persons interact: the Director, the Executive Secretary and the Doorman.

This minimum structure of 3 persons is part of the current nature of the ID, i.e. a coordination body that hires external consultants as teachers. Nevertheless, in times of a high demand for courses this personnel is insufficient to cover all activities. This may imply shortcomings in the phases for promotion of the courses, induction and study plan adjustment.

The current personnel are skilled, deeply committed and very responsible; therefore, with an adequate and equitable distribution of responsibilities, it would be possible to enhance efficiency in use of the human resources.

Besides the administrative personnel, the ID has a group of professionals that are hired as teachers for the different courses according to their field of specialisation.

The ID team operates on a demand-driven basis and does not have a formalised Functions Manual for either fixed or temporary personnel. The tools of the institute, which support operation of the organisation, are compilations of the procedures the administrative personnel follows on a daily basis. This compilation is not based on any consistent-organic foundations, which enables the avoidance, detection and timely solution of errors. However, all people interviewed from the Administrative Area consider that these tools facilitate their daily activities and that these instruments have enhanced efficiency of their daily work. In turn, this aspect is founded on the good interpersonal relations and fluent communication among employees and the access to the higher executive levels of MAN-B.

## 2.3. Vision, Mission and Values.

The ID has gradually defined its vision as an alternative training institution that is part of MAN-B and whose mission is to train Assistant Technicians in Sustainable Development with an ethical service approach, aimed at strengthening local development processes.

The Institute's Vision, Mission and Values are consistent with those of MAN-B; still, in practice, these are not adequately internalised in the spaces in which it interacts for the following reasons:

The **Vision** is interpreted as the idealisation of the future of the entire organisation. When there is conceptual clarity on what one wants to build towards the future, the direction and execution can focus constantly on achieving this.

When there is a **Shared Vision**, there is a strong sense of ownership and commitment in the people's hearts, and so everyone will follow the road towards the future, making contributions and developing their potential. It is a road that starts within persons, through the development of a **Personal Vision**, according to which it is not sufficient to build individual aptitudes, but it is also necessary to improve them, which implies capacity and will to understand and work with the strengths of the people surrounding you and with spontaneity.

In an organisation, it is not enough for the general director to have a good idea of the future and be determined to attain it; rather, turning this idea into actions must be an objective shared by everyone.

The synthesis of the strategic purposes, as well as the key values that should be known, understood and shared by everyone who is part of the institution is what we know as the **Mission**.

The **objective of the Mission** is to orient and optimise the response capacity of the institution to opportunities of the environment; it is therefore defined considering the following four aspects: strategy, purpose, values, policies and norms.

The **purposes and values** of the organisation are aimed at generating a shared commitment within the organisational culture. On the other hand, the **policies and norms** define the concepts of productivity, efficiency, quality and profitability, and others which form a single structure.

What is missing in the ID is precisely this clear formulation of its Vision and Mission, and especially, the need for this to be internalised by both the administrative personnel and the teachers.

#### **2.4. Development objective.**

The ID has defined its own development objective, namely "to contribute to social development processes within the framework of local and organisational strengthening through the training of local human resources"; with the purpose of "rural municipalities and urban districts having access to advice and technical assistance from human resources trained by the ID in local development processes".

In practice, it is clear that the work of the ID only meets one part of its development purpose, whereby the technical assistance after the training process is still missing. The technicians need to be able to not only prepare profiles but also local development projects and the management thereof.

In this sense, it is necessary that in the municipalities that are not work areas of MAN-B, the ID enters into strategic alliances with NGOs to locally provide technical assistance to the trained persons. This way, the ID would achieve its objective of training Assistant Technicians as the first part of the training process and the other NGO would then continue with the second part, i.e. technical advice in a specific process related to the preparation of local development projects. As in this second phase, participants would acquire complementary knowledge, they would be granted a diploma as Intermediate Technician.

For developing the student's capacity to effectively use his/her capacity to solve technical-practical matters, there is a need for effective links between the fields in which the student is trained and the problems of the local context, where the acquired capacity can be evaluated constantly.

There is also a need for links to the market. This way, support can be provided to the municipalities where MAN-B does not work, thus ensuring a deeper impact on local development

**In this sense, the evaluation team is aware that it needs to progress towards a second phase of the training process, which refers to the knowledge and technical advice the Assistant Technicians need for acquiring skills in community project management and thus attain the ID's purpose in terms of development. This can be materialised if the ID and MAN-B are prepared to enter into strategic alliances with other stakeholders and/or organisations that work with a diaconal approach and that work in the field of local development.**

## **2.5. Use of planning instruments.**

The ID has a format for the annual plan and reporting provided by the office of Norwegian Mission Alliance from Oslo as well as a format provided by the office of MAN-B. The basic planning instrument the ID uses are formats prepared by MAN-B's planning office besides an initial logical framework.

The used tables are mainly programming tables, rather than planning tables. In the reports, the data are not always consistent as in the format sent to NMA-Oslo it is not possible to introduce all information. Therefore, annexes should be forwarded, especially with qualitative information on the activities, the results and the initial impact.

We have seen that in the ID there is no clear concept of strategic planning and of the generation of concrete proposals to promote institutional actions in the medium and long term. At all times, the adscription to institutional policies is ratified based on the experience of the Coordinator and the Secretary and these persons' leadership, but this attitude does not coincide with the most up-to-date forms of strategic planning.

In this same line, we have seen that both in academic and administrative aspects, management tends to focus on a multiplicity and a variety of actions, with the risk of losing touch with the ID's strategy. ID personnel displays a weakness in terms of the use of planning instruments and the importance and usefulness of the logical framework in this sense.

Unfortunately, the institution can take decisions and actions towards their objectives based on trial-and-error criteria. Some even claim that investing time in strategic planning and thinking is a "paralysis due to the analysis".

It is true that it is not enough to think, and that there is a need to act as well, but the norm should be to think and plan to then act adequately. This habit helps to avoid a loss of time, to optimise actions, to ask the correct questions, to analyse the best way

to implement operational plans and to look at all details of the daily actions. It even helps to anticipate problems and find answers to questions that arise on the way.

## **2.6. Teaching personnel.**

For achieving the objectives of the ID, the work of the hired teachers is fundamental, which is why it is necessary to clearly define their profile.

They must have an updated knowledge, be competitive, they must constantly interrelate with the academic world, they must act with responsibility, they must be able to take advantage of the available information and generate their own information, they must be able to involve the students in their investigations, promote the values of MAN-B and the ID and be committed to their environment.

### **2.6.1. Teacher selection process.**

For selecting the teachers, the ID has defined a series of basic criteria such as:

- a) knowledge of municipalism
- b) experience in teacher training and education
- c) basic knowledge of Aymará
- d) lecturing, didactic and pedagogic skills

For giving the courses, the ID has a team of teachers hired for certain courses. They do not have fixed labour agreements, which implies a risk in the sense of the teachers not working for the ID anymore when they get a stable job.

The teacher training process consists of the following phases:

- analysis of the candidate's résumé,
- an interview with the Selection Committee made up of the Coordinator and the Executive Secretary.
- a pilot class.

Appointment is for the duration of the course, based on a fee-for-service arrangement.

There are no clear guidelines regarding different academic requirements for the teachers of the different courses offered by the ID.

The ID has planned an introductory period for each teacher. This means that the teachers receive a binder with documents on the vision, mission, values of the ID and of MAN-B. However, time is very short to ensure identification of the facilitator with the mission, vision and values of the ID, to ensure ownership of these elements and to transmit them in his/her pedagogic practice.

As the teachers are the ones representing MAN-B and particularly the ID in practice, there is a need to complement the existing selection criteria with new criteria to show the vision or development paradigm of the candidates and to check whether these are

consistent with MAN-B's development vision, as well as to find out more about his/her personal values that guide his/her attitude and personal life.

At the moment, the ID has a portfolio of teachers who meet the basic criteria and who have adequately performed their training responsibilities, ensuring a good image and performance of the Assistant Technicians in Development they trained.

**It is necessary to have a database on possible teachers, considering the employment instability characterising this type of work.**

Based on the study plans and the manuals for teachers and students developed by the ID, the teachers submit an initial plan with the content of the course, on their respective activities as well as a final evaluation report upon conclusion. They also enclose evaluations which the students make of the course and of the teacher.

The ID has designed forms for the following phases of the educational process:

- Planning of the course at the level of the module and of the topic.
- Evaluation report upon conclusion of the course.
- Forms to evaluate the facilitator and course, which are filled out by the students.

There are no instruments for the following aspects:

- A diagnostic – evaluation at the beginning of the course, at the beginning of each module or at the beginning of each topic. However, the facilitator is instructed to perform this evaluation at the three levels (course, module, topic).
- There are no forms for process evaluations.

Besides filling out forms for planning and for the final evaluation of the course, there are meetings of the teachers and the ID Coordinator, both before and after the course, aimed at reinforcing both phases.

**The teacher performance evaluation is important and necessary for all educational institutions as this is helpful to know whether the educational objectives are being met, whether the didactic pedagogic practices are adequate and whether the teacher needs to reinforce any aspects to foment understanding and a change of attitude in the students.**

The ID has a system with forms and procedures, which needs to be strengthened.

**In the annexes, there is a base proposal on performance assessments which the ID can complement with other criteria as it may judge convenient in view of its objective.**

## **2.7. Student Profile.**

Because of the institution's nature and its development purpose and end, the students trained by the ID are people from the communities who are elected by their grassroots organisations in certain municipalities.

Promotion of the courses in the work areas of MAN-B is related to the intervention strategy of the operational team of each area. This team gathers information on the concerns and wishes of the target population's leaders regarding training, which is the basis to submit the training demand to the ID or other entities that may be in a position to provide this training.

The ID only receives information from the Area Coordinator or Facilitator on the requested courses and the number of participants, as well as on the date and place where the courses will be held.

Every MAN-B work area has a budget for training expenses within the Organisational Strengthening projects, which is used to pay the agreed amount to the ID.

If there is an agreement with the municipality to which the ID has offered its training courses and with which a work agreement was signed, then the students are selected by the grassroots organisations. Some municipalities selected the people to participate. In this case, the students pay themselves for food and tickets to attend the course.

The local municipal contribution is USD 2,000 for the Municipal Strengthening course, USD 1,500 for the other courses offered by the ID, particularly for training Assistant Technicians in Development. The results of these training courses are highly significant for the municipal authorities considering the significant investment they make.

### **2.7.1. Selection criteria.**

The selection criteria are:

- Men and women – mostly young people – who have no opportunities to study.
- They must be elected by their local organisation.
- Have a minimum level of schooling.
- Have a desire to participate in the training and commitment to socialise what they learned in their community.
- Identify with the needs and requirements for a change in the standard of living of their communities.

Although one requirement is that they must know how to read and write, in some cases illiterates have participated, but they were people with experience and a solid leadership role in their community. As the methodology is practical, other people truly value their participation.

### **2.7.3. Profile of graduated Assistant Technicians in Development.**

Having passed the course modules, the graduate students have the following profile:

- Trained men and women who are prepared to share the knowledge they acquired in their communities.
- In their communities, they facilitate the collective development of community-based development proposals and actions.
- Assistant technicians who are prepared to participate in Participatory Planning and in the development of a diagnostic as the basis for preparing communal projects.
- Assistant technicians who value women's participation in the different local activities of the communal and municipal organisation.
- Dynamic and positive Assistant Technicians who coordinate activities and who foment good human relations based on cultural, Christian and democratic values.

## **2.8. Drop-out rates.**

**In some cases, drop-out rates are very high in the ID courses, which shows irregularities in the provided training.** Especially the women and elderly drop out of the courses. This is because they feel excluded because of their age, because of their work, because of their family situation, because of their economic situation that obliges them to migrate or because of their faltering interest. Hence the need for reverting this situation and finding alternatives to decrease the drop-out rates through an organised and systematic institutional effort aimed at putting into practice educational and innovating actions to satisfy the student's basic needs, which will benefit the learning process.

Alternative education is not about the teacher just teaching, but it is about listening and responding to the demands of the people. In other words, before the teacher starts, there is a pending task related to perception, negotiation and elaboration so as to meet the required educational needs.

This is very important for the work with adults, and a new demand which the ID and its teachers must be fully aware of.

Persons, especially women and adults, look for training opportunities that will help them solve practical problems: how to elaborate a project, how to prepare a comprehensive evaluation test to comply with the requirements of the study plan. These are some issues to be dealt with by the teachers who work with students on practical courses. Some of the teachers have no pedagogic background to respond to these demands and others, who are professional teachers, want to improve their practice through training courses on specific areas. **This shows the importance of performance assessment and methodological reviews to be performed constantly and systematically by the ID.**

The training is faced with the following challenges so as to be a contribution to development:

- Ensure quality and innovation in the learning process, in the pedagogical methods and in the didactic tools.

- Pertinence in accordance with local needs.
- The educational functions must focus on the comprehensive training of persons who think, who participate and who display solidarity, within the framework of social responsibility and with the obligation of replicating their knowledge in their communities and encouraging their community to participate in the local development process.

### **3. The ID 's Training Offer.**

#### **3.2. Thematic content of the training.**

The ID has developed a package of thematic contents that correspond to training axes based on the new People's Participation Law and the Municipalities Law, and specifically focusing on municipalities that wish to be productive.

The ID's training offer covers five courses that respond to training demands and that aim at strengthening municipal development processes.

The courses are:

- Municipal strengthening
- The environment
- Project development
- Integrated accounting
- Gender and communal development

In practice, a series of topics are included as crosscutting topics such as values and gender equity.

The study plan has been prepared based on an interaction between the management and administrative personnel of the ID and the teachers. This has given rise to the following educational instruments: manuals for participants, manuals for teachers, evaluation instruments to assess the students, instruments for the students to evaluate the teachers, as well as a guide which the students receive at the beginning of each module.

The methodology used by the teachers is dynamic and practical, based on learning by doing, which is highly valued by the participants. Participants also value the following aspects:

- The content of the training they receive.
- The diploma they receive, which is recognised by the Ministry of Education.
- The fact that the academic activity takes place in their community.
- Use of their language (Aymara).
- The timeframe of the courses – usually three days (Friday to Sunday).
- The participatory methodology the teachers use. The dynamic and practice the teachers use to explain things.

- The human and direct relationship with the teachers, which generates trust and security.
- The teachers' contact and will.
- The level of required performance in the practical evaluations.
- The guide the students receive at the beginning of each module, which is their reference book after the end of the course.

The programmatic content has varied according to the demand, especially demands of the municipalities. **However, it is necessary for the ID to continue specializing in the focal topics aimed at achieving its development objective, its purpose and the expected outcomes.**

The final goal of alternative education is to contribute to the development of skills which the students will need to become full citizens.

These skills are related to knowledge of the different topics that are part of the ID's training content, **but there are certain matters that are not dealt with from an exclusively academic perspective and that must be considered from a crosscutting perspective, as an indispensable element for a developing social dynamic.**

The crosscutting topics must be included in the entire alternative education process offered by the ID. And these topics are crosscutting because they go beyond the study plan in a strict sense and they must cut across all activities of MAN-B and the ID. It is not very consistent that the study plan mentioned certain values but that the organisation works on the basis of opposite models.

The evaluation team considers that the ID must include the following crosscutting topics: gender, values and interculturality – as these values are very relevant for the problems and conflicts occurring at the moment, and which require clear personal and collective positions. The idea is for students to value their own critical opinion on the problems, so they would be able to adopt a rational and freely adopted attitude.

Just like all topics related to power relations, gender is a conflictive issue. Historically speaking, the social construction of what is female and what is male has been focused from different perspectives.

Projects with the gender approach are sensitive to gender relations, aiming at a transformation with new equity-based relations between men and women. This topic can be focused with men and women together or specifically with women, though it is important to always include this topic in the training, i.e. to incorporate the gender dimension as a crosscutting topic.

The need for including the gender approach is related to the nature of the projects. As these are social intervention processes, generated by and focusing on persons, groups of persons, or social groups, it is important to consider what situations are affecting (or may affect) the expected outcomes.

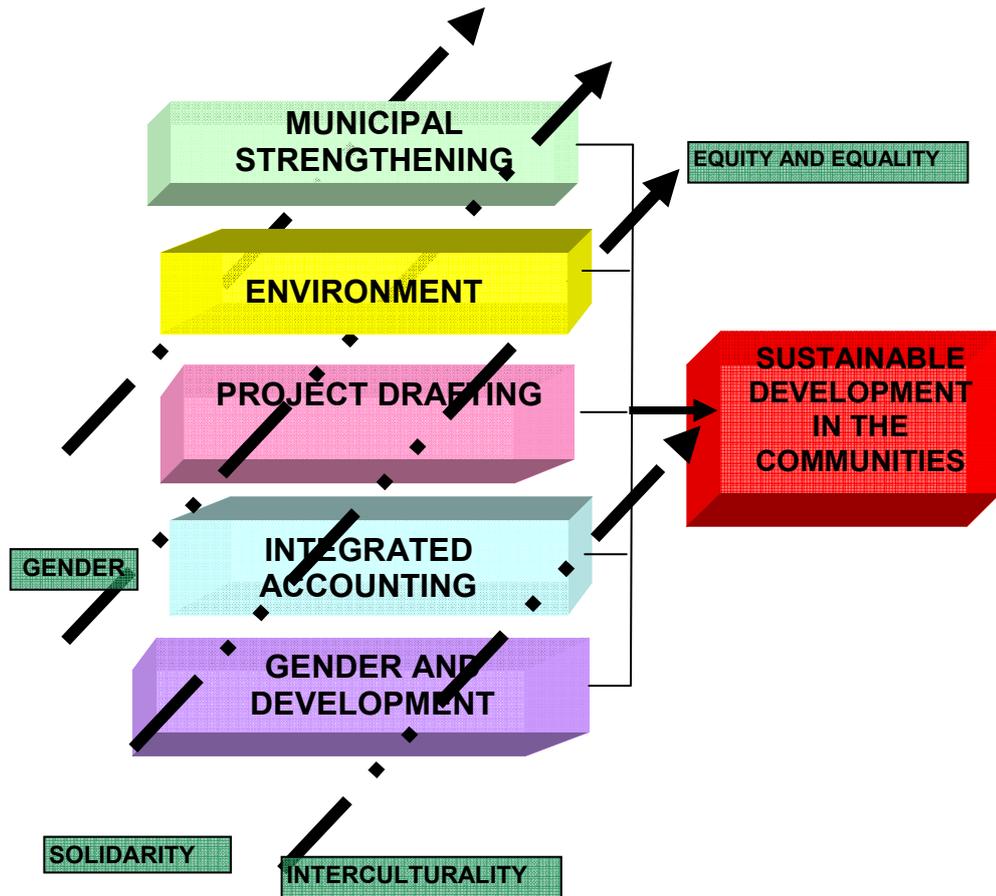
Some of these situations are related to social gender constructions. Even projects with a neutral concept of the social reality with which they work reproduce gender discrimination in different ways, meaning that these projects become “blind”.

As gender is a crosscutting topic, the achievement of gender equity must be included in the policies, programmes and projects. The gender approach is a “democratising” element. Hence, if equality and social justice are values of the ID, it is necessary to include the gender approach by systematically integrating situations, priorities and needs of men and women in all policies. This means “taking into account matters related to equal opportunities for men and women, in a crosscutting manner in all policies and actions, rather than focusing this topic only through direct and specific actions for women only”. **Anyhow, the specific programmes are still necessary as well, so the programme should centre on two aspects: gender as a crosscutting topic and projects with a specific focus.**

On the other hand, the topic of Interculturality can be understood as the normative principle aimed at inventing new forms of a harmonic relationship based on the principles of the recognition of and respect for differences.

It is an indispensable perspective to build a truly democratic system, in which cultural differences do not generate inequality and exclusion and which rather generates a space for consensus-building and reaching agreements; where there are no 'minorities' excluded from representation, opinion and decision-making as regards the administration of power. **Evidently, this perspective is an ethical-political proposal aimed at reducing asymmetrical relations between cultures and establishing the roads towards an intercultural dialogue based on tolerance.**

In the opinion of the evaluation team, the ID must specialise in focal and crosscutting topics, with the purpose of attaining its development objective, which is visualised in the following chart:



## **9. Intervention areas for training.**

The ID has defined three intervention areas in which it offers its services, in which it has implemented a work strategy and gained a certain degree of experience. These areas are:

- Municipalities of La Paz.
- Coverage area of MAN-B.
- Other institutions.

### **Services provided to municipalities of La Paz.**

At the moment, Bolivian municipal governments have been economically strengthened by the transfer of part of the National Treasury resources thanks to the People's Participation Law (20% of the Treasury resources); by the distribution of the external debt alleviation programme (HIPC II), the distribution of the Direct Hydrocarbons Tax (IDH) and their own income from taxes and rates.

The municipal decentralisation involves the creation of local governments as per the Municipalities Law no. 2028, which demands the drafting of Municipal Development Plans with a strategic vision and in a participatory manner.

Therefore, the municipalities and their local governments are ideal spaces for the ID to offer its training courses for Assistant Technicians in Sustainable Development and thus contribute to a closer relationship between the population and the municipal government.

At the moment, the Coordinator and Executive Secretary visit each municipality where they get in touch with the mayors and councillors. They pay several visits until the ID's services are hired.

The ID offer has been strengthened with radio announcements in Aymará, and through the distribution of posters and diptychs. This is a time-consuming activity for the limited personnel of the ID, with no perspective of sustainability in the long-term as the municipalities that value the training and give priority to this aspect in their work plan contribute a considerable amount of money for paying the training courses. Hence, for the municipalities it is not possible to cover the cost of more than 3 courses.

In 2004, the ID visited 17 municipalities, with 8 of which an agreement was signed. This first experience of reaching the municipalities where MAN-B was unknown was a major challenge for the ID, a valuable experience and an incentive to go ahead.

In 2005, the courses were offered to 18 municipalities, only 2 of which accepted the offer as this was a year of political transition, which affected continuity of the educational programmes in general. However, in that same year besides Municipal Strengthening the ID started with courses on Gender and Development, and Integrated Accounting, as well as other activities that generated an income, e.g. the

workshop: “Education for All, How to Achieve this in an Andean Context”, with participants from Ecuador, Peru and Bolivia.

In 2006, the promotional activities were intensified in the rural municipalities of La Paz. Eleven municipalities were contacted and agreements were signed with 6.

Various rural municipalities expressed their interest in the ID’s training package, but the lack of economic resources is an important constraint. In this sense, as from 2004 the ID got in touch with private organisations for these to give economic support to the municipalities. This way, the ID obtained economic aid from the University of Murcia-Spain, the Methodist Church, the Latin American Council of Churches and Diaconía FRIF, with amounts covering 50% and in other cases 25% of the costs.

When making an analysis of the ID training courses, we see that there is no clearly defined strategy to ensure achievements in the medium and long terms. Nonetheless, the strategic actions of the Institute are of an immediate scope. The establishment of strategic alliances with other stakeholders for a comprehensive intervention in the municipalities is a priority task to be focused by the ID aimed at diversifying and decreasing costs for the municipalities and thus widening their coverage.

This weakness is reflected in the number of municipalities where the ID developed training activities between 2004 and 2007.

<b>YEAR 2004</b>	<b>MUNICIPALITY</b>	<b>PROGRAMME</b>
1	Curahuara de Carangas	Municipal Strengthening
2	Ancoraimes	Municipal Strengthening
3	Puerto Carabuco	Municipal Strengthening
4	Luribay	Municipal Strengthening
5	Umala	Municipal Strengthening
6	Batallas	Municipal Strengthening
7	Santiago de Machaca	Municipal Strengthening
8	San Pedro de Curahuara	Municipal Strengthening
9	Alto Norte (Work area of MAN-B)	Municipal Strengthening
10	Caranavi (Work area of MAN-B)	Municipal Strengthening
11	Combaya (Work area of MAN-B)	Municipal Strengthening

<b>YEAR 2005</b>	<b>MUNICIPALITY</b>	<b>PROGRAMME</b>
1	Laja	Municipal Strengthening
2	Colibri	Municipal Strengthening
3	Alto Norte (Work area of MAN-B)	Municipal Strengthening
4	Sorata (Work area of MAN-B)	Municipal Strengthening
5	Combaya (Work area of MAN-B)	Gender and community-based development

<b>YEAR 2006</b>	<b>MUNICIPALITY</b>	<b>PROGRAMME</b>

1	Santiago de Machaca	Integrated Accounting
2	Quiabaya	Gender and community-based development
3	Taraco	Municipal Strengthening
4	Ancoraimes	Project Drafting
5	Combaya	Computer science
6	Batallas	Municipal Strengthening
7	Santiago de Machaca	Municipal Strengthening
8	San Pedro de Curahuara	Municipal Strengthening
9	Alto Norte (Work area of MAN-B)	Project Drafting Gender and community-based development
10	Caranavi (Work area of MAN-B)	Project Drafting
11	Combaya (Work area of MAN-B)	Computer science Environment

Albeit that its intervention in the municipalities requires a considerable economic contribution, the ID has been successful in offering its training services. Some municipalities that already received the Municipal Strengthening course, have asked to provide other courses as well.

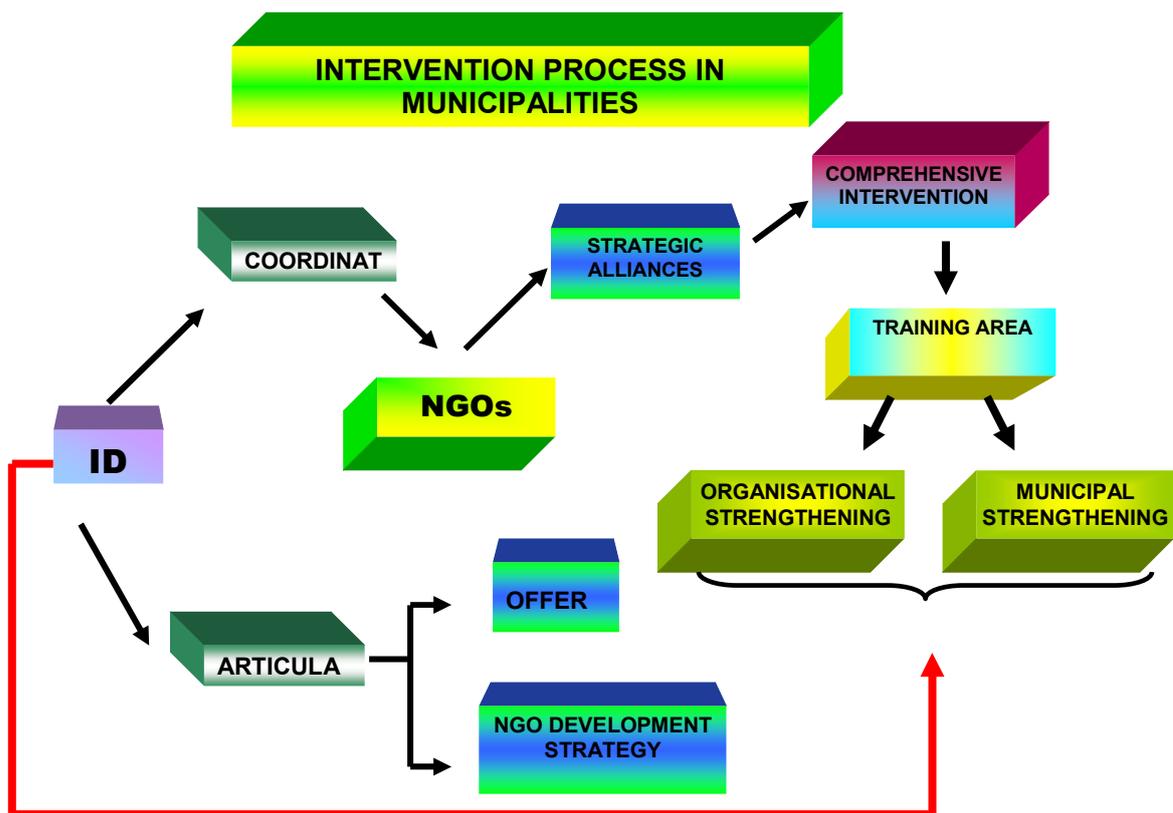
In most consulted municipalities, the municipal authorities say they are satisfied with the provided training and the obtained results.

It is very important for this policy of strategic alliances to be adopted at the level of MAN-B as a whole. Synergy with institutions that have developed Municipal Strengthening strategies is fundamental.

According to information received from the ID, an attempt has been made to enter into strategic alliances with institutions whose principles are similar to those of MAN-B, which work in the department of La Paz. Other institutions that work with the municipalities offer their contribution in kind with didactic material, teachers, etc. This is not accepted by MAN-B, as the contribution must necessarily be in cash. This should be revised as the fundamental point is about offering training to persons from grassroots levels to promote local development.

For enhancing the effectiveness of the ID's intervention in the municipalities, the evaluation team considers it is necessary to enter into strategic alliances, as it is more difficult for only one institution to achieve its objectives.

Taking into account these elements, we propose establishing synergies and focusing on comprehensive actions as mentioned in the following graph:



**Services offered in MAN-B's work areas.**

Based on the historical background of the ID, it is clear that the institute was created to offer training and advisory services outside MAN-B. Nonetheless and because of its strengthening process, and the affirmation of its identity according to its nature, at the moment it can offer its services within MAN-B in the municipalities in which Mission Alliance works.

The intervention areas of MAN-B have to implement its Organisational Strengthening project, in which human resources training is fundamental. Therefore, they receive the demands for training from the grassroots organisations.

Besides the ID, there are other NGOs in each area that also offer training. The Area Coordinator decides with which institutions it will work. If the Area decides to work with the ID, the ID will receive information from the Area Coordinator on the requested courses approved in a joint planning process with the grassroots organisations. Thus, with the ID an agreement is reached on the dates, hours and place where the training will take place.

The authorities of MAN support the services offered by the ID in the work areas aimed at consolidating the Organisational Strengthening project in each area.

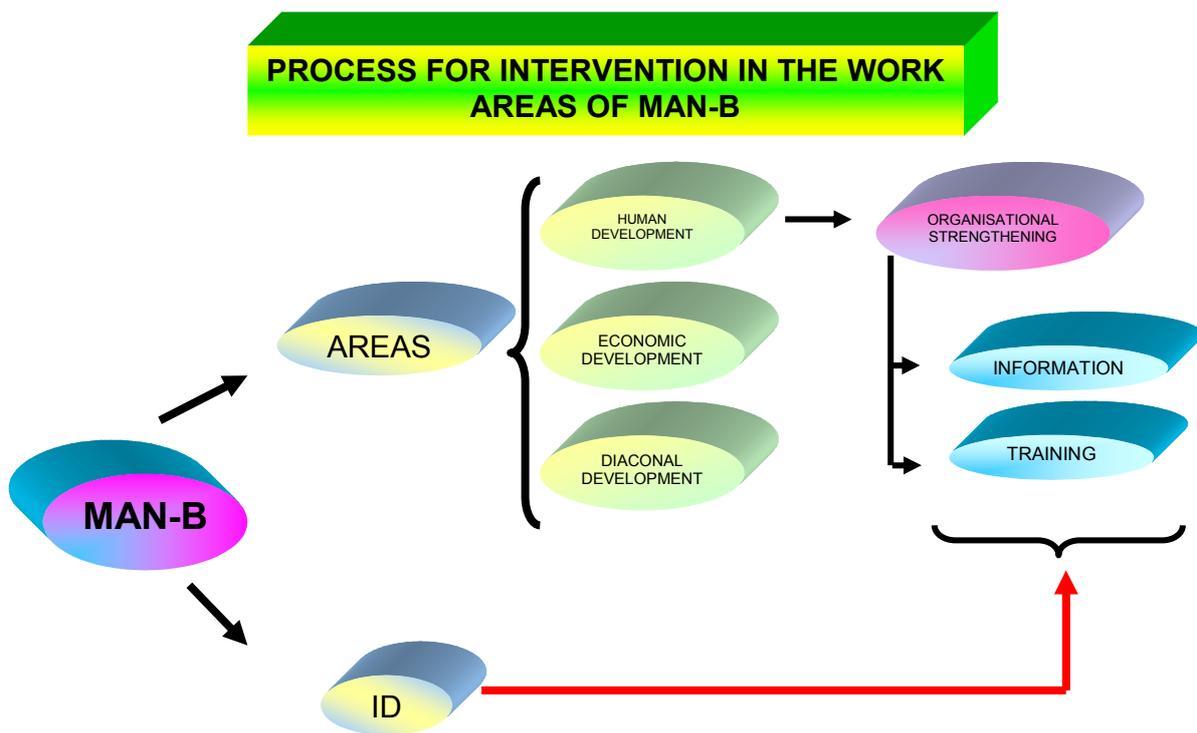
This is possible if this project is part of an axis of the Strategic Plan of MAN-B on capacity-building of the organisation, management and articulation of the persons and social organisations, with the intention of empowering or further developing the

capacities of the community to participate in democracy and interact with State institutions.

Even though the ID is part of MAN-B, there is no close interrelation with the other work areas and there is no participation in the process for evaluation and planning of the training, which means the relationship is merely based on the provision of services.

**In this sense, the ID is faced with the challenge of using its experience in training and taking actions to enhance ownership of and participation in this space provided by MAN-B, articulating and coordinating its action with the intervention areas for strengthening the social organisations, the networks and for articulating popular initiatives with other institutional initiatives.**

This form of work in the work areas of MAN-B is visualised as follows:



## 10. Plan 2004-2007. Results and Impact.

The ID's training has caused a valuation of persons, heightening their self-esteem and producing important results in the process for development of their communities.

The women who participated have finished their studies and they have a diploma accrediting them as Assistant Technicians in Development, with an increase of their self-esteem and self-value. One is impressed when they tell that now they can talk without fear, without shame, that they know their rights and obligations as part of a community and of a country.

It is difficult to express these qualitative results in numbers, though it is clear that there is an impact on persons and their communities. We have also heard the men say that now, they value the women a lot more as they have seen their development in the courses as well as their qualities and values.

In various cases, we have seen that the men and women participants who have concluded their training have started communal processes for drafting project profiles, some of which have later carried out these projects with technical assistance.

Though its goal is to train a certain number of Technicians in Development, the ID has not yet consolidated formal mechanisms for ensuring the graduates' commitment to transmit the acquired knowledge in their communities and to draft projects in a participatory manner.

**There are mechanisms but these have not yet been concretised based on agreements for the Assistant Technicians to strengthen the municipal governments, e.g. through traineeships. Nevertheless, we have seen that there are some exceptions as in some cases the Assistant Technicians have obtained a job in their municipalities, in MAN-B and in other NGOs.**

The ID has not been able to include the wisdom of previous generations in its development paradigm, which is a risk towards the future. If this wisdom is lost and if the young people no longer respect this knowledge, the development style will be estranged and not set within the context. There is a need for deepening and incorporating interculturality and intergenerational relations much more as crosscutting elements so as to achieve development of the communities.

### **5.3. Results of the activities proposed for 2004-2007.**

The ID planned the following activities for 2004:

- Sign 8 agreements with municipalities for training Assistant Technicians in Development; 100% of the goal was achieved.
- Organise 40 training events and 16 information events in 8 municipalities. Forty-two events were carried out and for administrative reasons in some municipalities, only 12 information events were carried out.
- Coordinate with the 3 work areas of MAN-B for 3 training and information events, which was completely met.

For 2005, the ID planned the following activities:

- Sign 8 agreements with 8 municipalities and 3 agreements with the work areas of MAN-B. An agreement was signed with only 2 municipalities,

because of the transition of the municipal government administration, which caused a deficient knowledge of the programmes and financial matters in the municipalities among the new authorities.

- In the work areas of MAN, the events were carried out though with a lower number of participants due to the limited drawing power of the areas.

For 2006, the ID planned the following activities:

- 180 technicians trained in the 3 work areas of MAN-B. 225 were actually trained. The drawing power and organisations in the areas improved considerably.
- 240 participants informed in 6 seminars in the work areas of MAN-B. No information events were concretised as the work areas of MAN-B chose to organise training courses that did not consider information events.

For 2007, as per the annual plan the ID sends to NMA-Oslo, the goal was to reach 10 municipalities and achieve the graduation of 300 Assistant Technicians in Development, besides informing 800 participants on topics of a national interest.

In the work areas of MAN-B, the goal is to achieve the graduation of 180 Assistant Technicians and provide information to 300 participants.

These goals will be difficult to achieve as between January and July 2007, only 15 Assistant Technicians graduated in the municipalities and another 36 in the work areas of MAN-B.

The Annual Operational Plan 2007 considers the provision of advisory services at invitation and the sale of a service regarding the organisation of a seminar - workshop at the international level. These activities are included in the third intervention component: the provision of professional services to other organisations. (see matrix of the POA 2007)

YEAR 2004	MUNICIPALITY	PROGRAMME	No. of Assistant Technicians	No. of participants in free modules	Total no. of participants
1	Curahuara de Carangas	Municipal Strengthening	24	18	42
2	Ancoraimos	Municipal Strengthening	19	30	49
3	Puerto Carabuco	Municipal Strengthening	23	4	27
4	Luribay	Municipal Strengthening	24	5	29
5	Umala	Municipal Strengthening	7	25	32
6	Batallas	Municipal Strengthening	11	10	21
7	Santiago de Machaca	Municipal Strengthening	18	11	29
8	San Pedro de Curahuara	Municipal Strengthening	11	39	50
9	Alto Norte (Work area of MAN-B)	Municipal Strengthening	39	8	47
10	Caranavi	Municipal	28	20	48

	(Work area of MAN-B)	Strengthening			
11	Combaya (Work area of MAN-B)	Municipal Strengthening	27	3	30
	Total		231	173	404

YEAR 2005	MUNICIPALITY	PROGRAMME	No. of Assistant Technicians	No. of participants in free modules	Total no. of participants
1	Laja	Municipal Strengthening	13	7	20
2	Colibrí	Municipal Strengthening	26	44	70
3	Alto Norte (Work area of MAN-B)	Municipal Strengthening	38	11	49
4	Caranavi (Work area of MAN-B)	Municipal Strengthening	12	21	33
4	Sorata (Work area of MAN-B)	Municipal Strengthening	5	14	19
5	Combaya (Work area of MAN-B)	Gender and community-based development	19	29	48
	Total		113	126	239

YEAR 2006	MUNICIPALITY	PROGRAMME	No. of Assistant Technicians	No. of participants in free modules	Total no. of participants
1	Santiago de Machaca	Integrated Accounting	19	18	37
2	Quiabaya	Gender and community-based development	11	28	39
3	Taraco	Municipal Strengthening	20	45	65
4	Ancoraimes *	Project Drafting			
5	Combaya *	Computer Science			
6	Alto Norte (Work area of MAN-B)	Project Drafting	49	6	55
		Gender and Development	23	73	96
7	Caranavi (Work area of MAN-B)	Project Drafting	12	17	29
8	Combaya (Work area of MAN-B)	Computer Science	15	7	22
		Environment	18	5	23
	Total		167	199	366

\* the courses will start in 2007

The total number of persons trained between 2004 and June 2007 is 1,050, 563 of whom are Assistant Technicians in Development (both in the intervention areas of MAN-B and in the municipalities where only the ID provided training), the rest participated in the training through free modules or information events.

In the plan 2004-2007, the ID has set very high results indicators, such as:

- At least 80% of the 1,280 local human resources from the municipalities where MAN-B does not intervene, graduate as Assistant Technicians in Sustainable Development, i.e. 1,024 persons. As at June 2007, the number of graduates is 241.
- At least 80% of the 1,200 local human resources from the intervention areas of MAN-B graduate as Assistant Technicians in Sustainable Development, i.e. 960 persons. As at June 2007, only 321 persons graduated.

The same happens at the level of the purpose indicators:

- 27 rural municipalities receive advice from at least 10 Assistant Technicians trained by the ID in their local development processes. As at June 2007, activities had been undertaken in only 14 municipalities.

The ID team is clearly making efforts to catch the attention of the municipalities for the training it offers. However, it has been unable to achieve the goals proposed in its annual plans. This is due to a series of factors, such as the fact that the law stipulates that a certain percentage of the municipal budget must be used for training human resources; but the municipal authorities do not assign sufficient importance to education, they prefer physical works. Political instability is another factor, as well as the fear of certain municipal authorities that persons know the law and will demand respect for their rights and question the municipal administration; hence, they do not want people from the communities to be trained and informed.

Another factor influencing the fact that a high percentage of the indicators is not achieved is the fact that the ID does not have a defined strategy to ensure sustainability in the medium and long term for offering its services.

**The principal difficulty for MAN-B and the ID is continuity of the processes and consolidation of the changes, because of the high turnover in the municipal governments.** This implies an additional effort to maintain a certain trained critical mass. Maybe this is the principal challenge in Bolivia and Latin America, where institutional instability is a major problem at the local level. The effects are clear in the composition of the decision-making levels and the definition of the municipal policies.

As part of the follow-up of the Assistant Technicians, a first meeting was held of the graduates of 2004 and 2005, in which the best students from different municipalities and work areas of MAN-B took part. The objective of the workshop was to share experiences and assess the extent to which the training they receive was helpful.

One of the outstanding elements was that the Technicians have replicated what they learned in their communities, giving explanations on how to draft operational plans and the municipal development plan. Others have started to work in their municipalities or are participating in the Surveillance Committees.

They also underlined the difficulties they have to actually apply what they learned, among other things because of the municipal authorities' resistance to replication of

the training, the lack of employment opportunities in the communities, the lack of support from municipal authorities who do not live in or are not from the community and who do not value the training of the assistant technicians.

**This type of events is important and the ID should include them in its annual planning as a modality for feedback on the work it does and the results it achieves.**

#### **5.4. Demand for productive courses in the municipalities.**

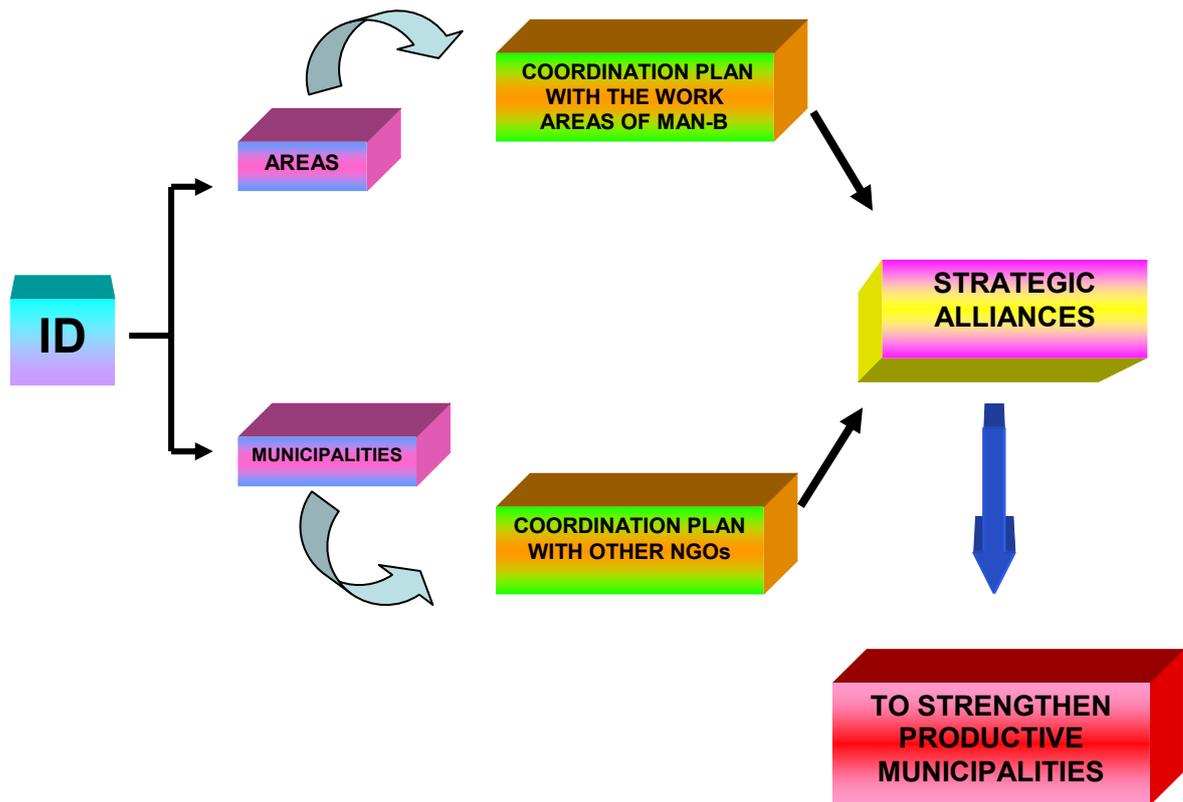
It is important to underline that the ID courses have been implemented in various municipalities that value this training and that want their municipality to continue participating in training courses. In conversations of the evaluation team with some of them, they said that their Municipal Development Plan includes funding for supporting productive activities in their area, but they consider that additional training is required in this sense and they are asking that the ID provide this type of productive training.

This is a great opportunity for the ID to support the municipalities for these to meet the objective of becoming productive municipalities; but to do so, it is important to clearly define its proposal and intervention, its capacity to provide the required training in this field.

In these municipalities, MAN-B and the ID must coordinate their activities with other NGOs with a similar development vision, aimed at entering into strategic alliances to offer training in view of the importance of having “Productive Municipalities”.

As regards the Intervention Areas of MAN-B, they must strategically define their intervention in Training together with the ID to support the strengthening of this type of skills in the municipality.

The orientation of these strategic alliances both with the areas of MAN-B and with NGOs working in the municipalities where MAN-B is not present is shown in the following illustration:



## 11. Information Management.

The ID has an adequate personnel information system and a complete and up-to-date database on the trained persons. This system includes personal data, the received courses, the results of the evaluation, the amount of received study hours as well as fieldwork practices.

This information is important because it is part of the history of the ID and the result of its activities.

According to information provided by the Coordinator, the ID has a basic system to track graduate students based on personal contacts and the annual meeting that started in 2006, in which experiences are shared and in which information becomes available on how the trained students use the training they received. (see Annual Report 2006, first meeting of Assistant Technicians).

This information the ID has is not yet used fully for preparing reports and subsequent decision-making at the level of MAN-B and NMA-Oslo. In the annual internal activity report, no significant information is socialised for MAN-B and other similar organisations to have more information on the ID's work and the results, mainly qualitative ones, that are being achieved.

There is also a webpage, but it is not updated by the communication department of MAN-B. This weakness regarding the sharing of valuable information is clear at the institutional level due to the lack of coordination and links of the different areas and sectoral projects of MAN-B.

## 12. Financial – Accounting Analysis.

One of the particularities of the ID is its funding modality. NMA-Oslo contributes with resources which MAN-B receives and then transfers to the ID as needed for covering salaries of personnel, as well as other administrative expenses (offices, telephone communication, desk supplies). The rest of the funding comes from other local sources of income, e.g. advisory services provided by the ID.

Every year, the ID submits its work programme and budget as per the format of NMA-Oslo to MAN-B.

The total funding sent by NMA-Oslo is divided into two parts by MAN-B, one part is deposited in the account of the ID to cover its administrative expenses and another part is used by MAN-B, as a contribution to its fund for administrative functioning of the institution.

Year	Total amount from NMA-Oslo	Total amount destined to administrative expenses of the ID	Total for MAN-B	Total executed by the ID	Difference between the allocated amount and the amount spent by the ID
2004	116,457	45,277	71,180	45,948.03	(-677.03)
2005	90,970	57,139	33,831	55,362.17	1,776.83
2006	65,483	*	*	*	*

\* due to internal problems in the accounting department of MAN-B this information is not available. To date, this information is being updated.

The ID must generate its own resources for paying the teachers, didactic material, modular contents, mobilisation and other expenses related to the training, which are covered with municipal revenues.

The revenues are deposited into a bank account in the name of the ID, with authorisation from MAN-B. For all training activities, a detailed budget is prepared and a fund request is submitted to MAN-B, which will authorise withdrawal of the required amount from the bank account.

When the activity is concluded, a financial report is prepared with the respective supportive documents. This report is submitted to the accounting department of MAN-B for review, approval and recording in the institution's accounting system.

There is a system to audit and track use of the local resources which the ID receives for the different activities it carries out.

According to banking information, the ID has BOB 150,932.01, which is the balance of the income obtained from the municipalities, the work areas of MAN-B, and other activities: advisory services, evaluations, etc.

From the point of view of general administration, including all accounting aspects such as personnel management and academic management, the ID has computerised systems that can provide ample and complete information.

### Local Income Obtained by the ID in 2004-2006

Year	Contribution Municipalities \$	Contribution Work Areas MAN-B \$	Income from other professional activities	Total income 2004-2006
2004	16,000	6,000	4,535.37 *	
2005	4,000	9,000	1,500. *	
2006	7,100	7,650	5,450 *	
<b>Total</b>	<b>17,100</b>	<b>22,650</b>	<b>11,485.37</b>	<b>\$ 61,235.37</b>

\* Advisory service for FEPADE

\* Workshop on Education BN/Noruega

\* Project evaluation in Colombia and course on methodology

Unfortunately, it was not possible to obtain all accounting information on the funds received from NMA-Oslo in 2006 and January to June 2007. Nonetheless, based on the financial information of 2004 and 2005 and the number of persons trained in this period, the following cost-result ratio can be calculated:

• Income from NMA:	102,416.00
• Local income:	41,035.37
<b>Total income:</b>	<b>143,451.37</b>

<b>Total number of trained persons:</b>	<b>643</b>
<b>Cost/result ratio:</b>	<b>\$ 223 per person</b>

### 13. ID Sustainability.

The number of consultancies, evaluations and advisory services is rather low and these activities were achieved only through personal contacts of the Coordinator, not on the basis of a strategy for the provision of institutional services. The evaluation team considers that the image and credibility the ID has built in the municipalities is a favourable factor that is helpful to show its management capacity to other institutions requiring this service.

Possibly, there is someone within MAN-B with social marketing experience that can give advice or maybe a professional could be hired for a certain period of time to develop a marketing strategy.

At the moment, it is indispensable for any institution that wants to survive in the current competitive world to know how to offer its services, which is why the ID should consider various factors such as the price of its services, and a clear definition of the training products it offers. The communication with the internal and external public must be clear and attractive.

**For the moment, the ID is unable to cover its administrative expenses, and it is also unable to work with more municipalities in a sustainable manner. But possibly, it can focus on marketing with long-term possibilities in mind, as the services it offers are very much needed and important to enhance people's self-esteem and ensure their active participation in their own development.**

## **Conclusions and recommendations**

### **1. Synthesis**

The ID enjoys prestige because of having implemented its programme for training Assistant Technicians in Development, which is carried out in various municipalities of La Paz and in the intervention areas of MAN-B.

The training experience for municipal management and development acquired by the ID in this period of major changes in Bolivia is very positive as it creates a space and opportunity for civil society in the municipalities and the work areas of MAN-B to become more visible and active in some local processes and initiatives, even though only in an incipient manner.

The trained Assistant Technicians in Development enormously appreciate the ID as the training is provided in their own communities, using a participatory methodology and using Aymara. This is an important aspect that distinguishes the ID as an alternative education institution, with recognition by the Bolivian Ministry of Education.

In a parallel manner, its identity and current structure are based on its track record and experience.

In its few years of existence, the ID has grown considerably through a series of measures to strengthen its training content, defining its training programme in response to the demands of persons, groups and municipal authorities. This type of development is the result of the way in which the ID relates to its immediate context and the dynamics imposed by its style.

The municipalities and the intervention areas of MAN-B contribute local resources to face the budget constraints of recent years. The obtained local revenues are therefore not the result of a clearly predefined, decisive direction as the basis for giving an opinion on whether the aspirations were satisfied.

Hence, its activities do not have unique objectives for the beneficiaries, but rather respond to different needs or demands. On the other hand, it is important to underline that these activities are the result of guidelines from the grassroots levels with which MAN-B works and which are the basis for functioning of the ID, as well as of demands from municipal authorities, which give meaning to the objectives of the ID and somehow condition its decisions and operating ways.

The consequence of this is that in a very short period of time the ID has had to adjust its way of operation and training content to local requirements.

This scenario explains the possibilities and difficulties the ID faces.

The evaluation shows that it is necessary to make an integration effort so as to overcome the problems, which seem to be related to the lack of operational implementation of the institutional policies of MAN-B. For the evaluation team, the perception of a relative internal disconnection is a sign of the importance of links between the capacities and central activities in institutional dynamics and the peculiarities of the demands from the context.

Various general considerations must be mentioned. First of all, the lack of operational coordination and communication among the areas and between the areas and the other projects of MAN-B, which shows an institutional weakness resulting from a decentralisation with weak coordination channels and which has caused isolation and much freedom in the actions of each area.

Based on the information collected in meetings and interviews, it is as if the ID is prepared to satisfy all demands or requirements related to human resources training. In view of this situation, the ID must be clear in that it focuses on training human resources for municipal management, so as to avoid a dispersion of its efforts.

**Hence, one of the tasks on which the institution must focus is a continued reflection on its strategic proposal and the further strengthening and affirmation of its identity and mission.**

In this sense, the future must be built based on the possibilities resulting from the integration of its capacity, on the already existing competitive advantage, consistently with a clearly defined mission and in response to the new challenges MAN-B faces.

We are convinced that the ID will receive these comments with the seriousness it displays in its actions. Over the period considered in this evaluation, ID authorities have shown a critical sense and a willingness to make efforts to overcome shortcomings and deficiencies.

The ID's team is fighting hard for building a consolidated institution that enjoys respect, especially in the municipalities where the authorities value the training of human resources, as a key element for local development, particularly as women and young persons who have not had an opportunity to show their skills and values for their own benefit and that of their communities are trained.

The conclusions and the recommendations presented below are based on this acknowledgment and the intention of contributing to the ID further improving the quality of its programmes and continuing to act within the framework of its institutional mandate, as a training institute in the MAN-B system.

## **2. Recommendations**

The evaluation team believes the following recommendations are pertinent:

- Generate a reflection and debate within MAN-B on inclusion of the support the ID could give for execution of the Organisational Strengthening project by its intervention areas.
- Generate a reflection within MAN-B on the risks of the decentralisation and independent operation of its areas and projects if there is no adequate internal coordination.
- Another challenge for the ID and MAN-B itself is the articulation of new initiatives and alternatives to overcome the organisation's isolated situation in view of the need for creating and strengthening networks to create synergies, for learning from one another and for acting together. In other words, the need for building territorial systems with a high level of synergy.
- The ID must define the content of its strategic training of Assistant Technicians in Development with a clear focus and crosscutting axes, which are wide enough so as to include demands but without widening the number of training axes.
- Establish pertinence criteria to make an adequate selection of the demands received from the communities, of adequate facilitators, of institutions to which it will provide its professional services.
- ID personnel must consolidate its knowledge on strategic planning by using its experience gained in the formulation of goals and objectives in the medium and long term.
- Review the Institute's organisational structure, adequately defining the personnel's competence and more clearly delimiting its responsibilities and functions.
- In the training programmes for Assistant Technicians in Development, include technical assistance for the elaboration, management and implementation of community-based development projects, including the next training phase, namely Intermediate Technicians, and taking advantage of the educational skills of the ID itself and of other NGOs that are working in the municipalities, through strategic alliances.
- Reaffirm its specific nature through a constant improvement of the quality, ensuring that quality is not affected by the quantitative growth.
- Build and establish capacity for ongoing evaluation and monitoring of its activities.
- Dedicate more time to introduction of the facilitators so they would have more knowledge of MAN-B, the ID and its development paradigm, and so they would be able to share this in the training they provide.

- Take advantage of the institution's existing capacity so as to use all possibilities of new communication technologies, give information on its work and particularly on its qualitative achievements.
- Define sustainable strategies that ensure involvement and participation of the persons trained in the municipal governments, through practical traineeships (replication, advisory services, etc), and thus ensure the graduates' commitment to community development.
- Define its intervention strategy and services, possibly with external support so as to achieve effectiveness in the long run.
- Make an effort for achieving a higher level of articulation between the different areas of MAN-B and provide good services to as to ensure confidence in the respective areas.
- Promote joint implementation of the Organisational Strengthening project of MAN-B so it would become a dimension of its training and information activities. There is a need to discuss how the progress made by MAN-B can be sustained over time and how the relationship of the work areas and the ID with the municipalities and civil society can become a constant and consolidated practice.
- Inside MAN-B, the ID was set up to strengthen development in the communities by means of training for human resources. The idea was also to generate economic resources to ensure project follow-up.
- To date, the ID has generated economic resources, which are however insufficient for attaining sustainability and for covering its operational expenses. In this sense, the ID needs more economic support for its administrative expenses.
- The number of consultancies and advisory services for other institutions is rather low and the provided services were at direct invitation, not the result of a strategy for the provision of professional services.
- The content of the ID's training and the results thereof are very valuable, something that is recognised by the municipalities where the ID has worked. We must therefore distinguish between two scenarios: raise economic resources and offer an alternative education for development of a very high quality, which will benefit MAN-B's development objective and its credibility in Bolivia.
- Both Norwegian Mission Alliance in Oslo and MAN-B must value these two aspects and reinforce its weaknesses, but there is no need to take radical decisions. Meanwhile, the quality of the training provided by the ID has been improved, though there are still some limitations, which is something characterising the nature and mystic of Norwegian Mission Alliance.

- Professional strengthening of the ID in the provision of services and the collection of training demand, so that in the long term its sustainability and success in training human resources for community-based development would go hand in hand.

September 2007

## PROPOSAL OF A SYSTEM OF INDICATORS TO ASSESS THE QUALITY OF THE ID'S TEACHERS' PERFORMANCE

The ID's evaluation system must be based on specific items discovered in the investigation, which have a positive correlation with the teaching output. This is the case of the indicators proposed below:

VARIABLE	DIMENSIONS	INDICATORS
Professional performance of the teacher.	1. Pedagogic capacity.	1.1. Extent to which (s)he dominates the training content, the Theory of Education, general Didactical aspects and Didactical aspects in specific areas.
		1.2. Capacity to teach in an interesting and entertaining manner.
		1.3. Quality of his/her verbal and non-verbal communication; use of Aymará.
		1.4. Capacity to adequately plan the teacher - educational process.
		1.5. Scope of his/her contribution to an adequate work sphere in the classroom.
		1.6. Capacity to identify and understand gender and generational situations and to adjust his/her pedagogic intervention accordingly.
		1.7. Use of a variety of educational practices.
		1.8. Degree of knowledge and application of individual psychological characteristics of the students.
		1.9. Degree of information on the learning process of his/her students.
		1.10. Quality of his/her lectures.
		1.11. Contribution to personal values and value-based development skills.
		1.12. Effectiveness of his/her training and self-preparation.
		1.13. Capacity to create a favourable sphere for students to know their rights and responsibilities and exercise these.
		1.14. Capacity to develop an ongoing self-critical reflection process on his/her educational practice.
		2. Emotionality
		2.2. Self-esteem.
		2.3. Capacity to act with justice and realism.
		2.4. Level of satisfaction with his/her work.

3 Responsibility in performing his/her professional functions.	3.1. Attendance and punctuality.
	3.2. Degree of participation in methodological sessions or reflections with ID teachers.
	3.3. Compliance with ID norms.
	3.4. Attained professional level.
	3.5. Personal participation in institutional decision-making.
	3.6. Degree of relative professional autonomy achieved for developing his/her work in the Institution.
	3.7. Achieved professional level.
4. Interpersonal relations with students, parents, management, teachers and the community in general.	4.1. Level of concern for and understanding of the students' problems.
	4.2. Expectations regarding development of his/her students.
	4.3. Flexibility to accept different opinions and feelings of the students and respect for their differences in terms of gender, race, socioeconomic situation, age and culture.
5. Results of his/her educational work.	5.1. Academic performance of his/her students in the areas (s)he teaches.
	5.2. Degree of value-based positive guidance for developing desirable personality qualities in the trained persons.
	5.3. Extent to which his/her students have feelings of love for their communities, nature, studies and the human kind.

## INTERVIEWEES

Reverend Tito Montero  
Reverend Rolando Villena  
Engineer Alejandro Lafuente  
Ester Quino  
Alfredo Quenallata  
Zonia Fabiani  
Edgar Fabiani  
Ubaldo Villca Rivero  
Lidia Quispe  
Iber Rolando Achá  
Pedro Quispe. Oficial Mayor  
Lino Andres Poma  
Virginia Lima  
Ignacio Catacora  
Donato Zabalo. Alcalde  
José Usuri Castro. Oficial Mayor  
Romulo Yampani Espejo  
Miguel Angel Cruz  
Lucio Ponce Vargas  
Marcos Canullo Mendoza  
Antioca Viscarra Fuentes  
Beatriz Velasco Limache  
Santiago Alcón  
Hugo Quito  
German Amba Tancara  
Tania Juadama  
Dainor Ajnota Alejo  
Federico Roman Valdez  
María Eugenia Loza de Mendoza  
Herlena Tania Salas  
Rosmery Carrillo

Victor Silvestre  
Roberto Alcocer  
Paula Laura  
Hortencia Limachi  
Hugo Daza  
Adan Machicado  
René Vega  
Alcides Vásquez. Representative of the Ministry of Education  
Maria Isabel Paz. CEBIA-E  
Bishop Eugenio Poma. Methodist Church

**TERMS OF REFERENCE**  
**II EXTERNAL EVALUATION OF THE EDUCATIONAL PROJECT**  
**INSTITUTE FOR DEVELOPMENT**  
**NORWEGIAN MISSION ALLIANCE IN BOLIVIA**

**I. BACKGROUND**

Norwegian Mission Alliance in Bolivia (MAN-B) is a non-governmental missionary, Christian evangelical non-profit organisation whose juridical capacity is recognised by the State through Supreme Resolution No. 192497 of May 1980.

MAN-B has worked in Bolivia for 27 years. Throughout these years, it has developed programmes and projects in production, training, support for social grassroots organisations, strengthening of Education and Health, and leadership training in both the urban and rural areas of La Paz. In the development and training processes, the organisation underscores the protagonist role of the community and its capacity to manage its own community-based development.

The Institute for Development, previously called the Diaconal Institute, is part of the Strategic Plan of MAN-B. For being part of the Institutional Plan of the Mission, the institution fomented a change process in the Institute, based on the External Evaluation in 2003 and also on the Internal Evaluation of the Institution, taking into account the following criteria:

1. Rethink its identity
2. Readjust its organisational structure
3. Draft sustainability strategies

**II. PURPOSE OF THE EVALUATION**

Verify achievement of the following results:

- a) Read the Municipal Strengthening Project to confirm whether the rethought identity of the Diaconal Institute was based on the results of the External Evaluation in 2003 and on the Internal Evaluation (Educational and Consultative Councils) contained in the project application for 2003 – 2007.
- b) Give advice to BN, Norwegian Mission Alliance in Bolivia, on the future operation of the Institute for Development, based on the recommendations of the evaluation.

**III. ORGANISATIONAL CAPACITY**

- a) Assess the organisational structure of the Institute. Criteria taken into account for reducing the personnel on payroll from 7 to 3 persons, and the reduction of 5 offices to 2.
- b) Evaluate the criteria the Institute has for hiring professional technicians as facilitators of the training processes.

- c) Evaluate the opinion of the Ministry of Education of the Institute's contribution with a target population that falls outside the formal educational system.

#### **IV. ACTIVITY PROFILE**

- a) Assess the programmatic content of the Institute (Municipal Strengthening Program), in terms of the use of planning instruments.
- b) Evaluate the Institute's strategies to develop its activities related to educational activities and promotion.
- c) Assess the extent to which the Institute has made evaluations upon invitation.

#### **V. CONTEXT**

- a) Assess the Institute's strategies to work with municipalities outside Mission's work area.
- b) Assess the Institute's strategies to deepen processes for training human resources, with the municipalities with which it has worked.
- c) Assess the degree of acceptance achieved by the Institute in the communities covered by Mission.

#### **VI. METHODOLOGY**

- a) The evaluator will meet with the coordinator, assistant and messenger to be informed of the work of the Institute with documentation of the programme and accounting documents:  
Meetings with Assistant Technicians in Sustainable Development from the Municipalities and from the work areas of Mission to find out whether the methodology responds to andragogic processes of the target population.
- b) Meetings with area coordinators to find out whether the programme offered by the Institute responds to the needs of the Institution.

#### **VII. INSTITUTIONAL FACTORS**

- a) Analyse to what extent the Institute is contributing to the Organisational Strengthening promoted by the areas of Mission.
- b) Evaluate interinstitutional relations with the State and private service institutions with a similar profile as the Institute.

#### **VIII. EXPECTED OUTCOMES**

- a) Verify the process for rethinking the identity of the Diaconal Institute.
- b) Analyse the process for rethinking the identity of the Institute for Development to know whether it responds to the internal needs of the Mission and the external needs of the target population in the Municipalities located in the Department of La Paz.
- c) Assess the process for structuring the Municipal Strengthening Program.
- d) Assess the project content in relation to the goals and strategies, and analyse the relationship of these with the goals (quantitative and qualitative relationship) and propose possible changes to achieve improvements.

- e) Assess the results of training processes of the Institute in the Municipalities and the work areas of the Mission, aimed at achieving sustainability of the program.
- f) Assess the expected income with the obtained results in the three-year period (2004-2006), aimed at determining up to what point the project can be sustainable or not.

## **IX. TIMEFRAME**

The evaluation will take place between July and August

<b>ACTIVITIES</b>	1 <sup>st</sup> Week	2 <sup>nd</sup> Week	3 <sup>rd</sup> Week	4th Week	1 <sup>st</sup> Week	2 <sup>nd</sup> Week	3 <sup>rd</sup> Week	4th Week
Revision of the documentation								
Fieldwork in the project area								
Preliminary Report for MAN-B								
First draft								
Final report								

## **X. CONCLUSIONS**

The conclusions and recommendations will be based on the results of the evaluation, for BN, Norwegian Mission Alliance in Norway and Norwegian Mission Alliance in Bolivia to take decisions towards the future to enhance viability and sustainability of the Institute for Development.