

# A.I.D. EVALUATION SUMMARY PART I

(BEFORE FILLING OUT THIS FORM, READ THE ATTACHED INSTRUCTIONS)

SN 8164

IDENTIFICATION DATA

<b>A. REPORTING A.I.D. UNIT:</b> <u>USAID/Bolivia</u> (Mission or AID/W Office)  (ES#)	<b>B. WAS EVALUATION SCHEDULED IN CURRENT FY ANNUAL EVALUATION PLAN?</b> yes <input checked="" type="checkbox"/> skipped <input type="checkbox"/> ad hoc <input type="checkbox"/>  Eval. Plan Submission Date: FY <u>90</u> Q <u>1</u>	<b>C. EVALUATION TIMING</b> Interim <input checked="" type="checkbox"/> final <input type="checkbox"/> ex post <input type="checkbox"/> other <input type="checkbox"/>  PD-ABP-736 XD			
<b>D. ACTIVITY OR ACTIVITIES EVALUATED</b> (List the following information for project(s) or program(s) evaluated; if not applicable, list title and date of the evaluation report)					
Project #	Project/Program Title (or title & date of evaluation report)	First PROAG or equivalent (FY)	Most recent PACD (mo/yr)	Planned LOP Cost ('000)	Amount Obligated to Date ('000)
511-0578	Title II PVO Management Support Project	FY 88	6/91	1635	1435

E. ACTION DECISIONS APPROVED BY MISSION OR AID/W OFFICE DIRECTOR	Name of officer responsible for Action	Date Action to be Completed
Action(s) Required		
1. Meeting with Planning Assistance to discuss recommendations and prioritize actions to be taken.	Salvatore Pinzino	04/10/90
2. Define policy on Mothers' Clubs and Supplementary Feeding Program.	SPinzino/JSleeper	07/15/90
3. Review Evaluation Results with Cooperating Sponsors	SPinzino/LFMoreno	07/30/90
4. Follow-up on recommendations.	SPinzino/LFMoreno	08/31/90

(Attach extra sheet if necessary)

**F. DATE OF MISSION OR AID/W OFFICE REVIEW OF EVALUATION:** mo 3 day 30 yr 90

**G. APPROVALS OF EVALUATION SUMMARY AND ACTION DECISIONS:**

Project/Program Officer Signature: <i>Salvatore Pinzino</i> Typed Name: Salvatore Pinzino Date: <u>6/21/90</u>	Representative of Borrower/Grantee Signature: <i>Charles Patterson</i> Typed Name: Charles Patterson Date: <u>7/10/90</u>	Evaluation Officer Signature: <i>Stephen Smith</i> Typed Name: Stephen Smith Date: <u>7/16/90</u>	Mission or AID/W Office Director Signature: <i>Reginald van Raalte</i> Typed Name: (Reginald van Raalte) Date: <u>7/20/90</u>
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H. EVALUATION ABSTRACT (do not exceed the space provided)

The three, correlative purposes of the project are: (1) the extension of basic child survival services and assistance in improving agricultural production and income to the poorest members of Bolivian society; (2) the establishment of three strong, well-managed, self-sufficient private and voluntary organizations (PVOs), CARITAS, the Adventist Development and Relief Agency (ADRA), and Food for the Hungry (FHI); and (3) the insurance of effective management and utilization of PL-480 resources, principally the Title II commodities. To achieve these purposes, Planning Assistance provides each of the three PVOs with managerial and technical assistance, such that each PVO achieves health and agricultural goals and major improvements in the development impact of its PL-480, Title II resources.

The mid-project evaluation, for the period July 1, 1988 through December 31, 1989 concluded that

-- Planning Assistance had made excellent progress in achieving the purposes of the project.

-- Planning Assistance has also successfully carried out important related activities such as the design and establishment of the common monetization program.

-- FHI has, in large part, already become the strong, self-sufficient development agencies envisioned in the purposes stated above.

The evaluators recommended that

-- ADRA and especially the 16 diocesan programs of CARITAS should receive the majority of all future assistance.

-- Planning Assistance should work more collaboratively with the Cooperating Sponsors and help them develop proposals and secure funding from non-AID sources.

ABSTRACT

I. EVALUATION COSTS

1. Evaluation Team Name	Affiliation	Contract Number OR TDY Person Days	Contract Cost OR TDY Cost (US\$)	Source of Funds
James Pines,	Independent Consultant	12 TDY person	\$ 3,468	P.A. Grant
Independent Consultant				
Janet Lowenthal,	Independent Consultant	12 days	\$ 2,640	P.A. Grant
Independent Consultant				

2. Mission/Office Professional Staff Person-Days (estimate) 2

3. Borrower/Grantee Professional Staff Person-Days (estimate) 5

2

# A.I.D. EVALUATION SUMMARY PART II

## J. SUMMARY OF EVALUATION FINDINGS, CONCLUSIONS AND RECOMMENDATIONS (Try not to exceed the 3 pages provided)

Address the following items:

- Purpose of activity(ies) evaluated
- Purpose of evaluation and Methodology used
- Findings and conclusions (relate to questions)
- Principal recommendations
- Lessons learned

Mission or Office: USAID/Bolivia

Date this summary prepared: 05/24/90

Title and Date of Full Evaluation Report: Serving Two Masters 03/31/90

The evaluators made the following recommendations to Planning Assistance and to USAID/Bolivia for improving Planning Assistance's PVO Management Support Project.

### FOR PLANNING ASSISTANCE

1. Planning Assistance should view recipients of its management assistance as clients in a relationship that is intended primarily to serve them, and avoid actions that appear to suggest lack of sympathy for, or acceptance of, client goals.
2. Planning Assistance should avoid actions that favor, or give the impression of favoring, USAID interests over those of the Cooperating Sponsors.
3. Planning Assistance should continue to provide technical and management help to applicants for grants, but should withdraw from any role in allocating funds from USAID or other sources. If this is not possible, staff involved in helping clients should be distanced, as much as possible, from reviewers. The management assistance team should engage only in those activities that are clearly consistent with being perceived as representatives of the Cooperating Sponsors.
4. Planning Assistance should be less directive and more reactive, seeking to respond to felt needs of clients. As client perceptions become more favorable, attempts to influence their assessment of needs, and setting of goals, can become more forceful.
5. When faced with irreconcilable differences with a client, after modest efforts to influence the client, Planning Assistance should accept the client's position, recording disagreement, and the reasons for it, by a friendly communication.
6. The meaning of self-sufficiency should be clarified, to include a) internalized capacity to maintain and improve new practices; c) identification of specific program levels at which self-sufficiency will be achieved; and d) identification of objective criteria for assessing client attainment of the minimum technical and managerial proficiency necessary for the desired program level.

-7. Future Planning Assistance help should focus on strengthening the internal capacity of ADRA and CARITAS to disseminate and reinforce changes initiated through PA seminars and other work.

8. Future assistance should give high priority to helping each Cooperating Sponsor a) calculate its "development funding gap" b) obtain funds to meet it; and c) develop the capacity to continue generating development support independently.

9. Planning Assistance should encourage independent preparation of documents by clients, to stimulate self-sufficiency and identify weaknesses. PA should then follow up with sympathetic and supportive assistance to correct deficiencies.

10. Planning Assistance should join Catholic Relief Services in developing a plan, in cooperation with CARITAS, for qualifying CARITAS to be a Cooperating Sponsors by the end of the grant period. It should also collaborate with ADRA International in planning self-sufficiency for ADRA/Bolivia.

11. Planning Assistance should abandon efforts to provide direct technical assistance in health to Cooperating Sponsors, since it lacks comparative advantage, and limit use of health consultants to assuring the continued high technical quality of PA management help.

12. Planning Assistance should reallocate provision of management and technical services, to assure that CARITAS receives at least twice as much help as ADRA during the project's remaining months.

13. Planning Assistance should array and compare alternatives for making mothers clubs more developmental, with or without commodity distribution. After identification of preferred alternatives, technical assistance from PA may be useful for institutionalizing the new models.

14. Planning Assistance should take USAID's best estimate of likely FY 90 and FY 91 Title II monetization, compare expected proceeds with client development needs at current program levels, and identify a "development funding gap" for each Sponsor.

15. Planning Assistance should be sure that clients understand the limited relevance of attractive graphic presentations for development planning, while emphasizing their advantages for attracting donors.

#### FOR USAID

1. USAID should distance itself from Planning Assistance, and encourage the assistance group to view itself as representing the Cooperating Sponsors.

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2. While continuing to use Planning Assistance as an intermediary for non-threatening communication with PVOs, USAID should only request new PA activities consistent with a collaborative relationship between Planning Assistance and Sponsors.
3. USAID should distinguish between making food distribution more developmental, which serves AID's own needs, and helping Cooperating Sponsors to become development organizations, which serves their needs.
4. Once a desired level of food distribution has been identified by USAID, it should help Cooperating Sponsors calculate the development funds needed to a) make all distributions developmental, and b) maintain current program levels by additional non-food developmental activities.
5. After reviewing monetization plans and limits, USAID should encourage each Sponsor to use Planning Assistance to help it identify and meet the development funding gap.
6. USAID should assist in organizing, though not necessarily in funding, a workshop on development planning for mothers clubs, with minimal reference to commodity distribution.
7. USAID should consider renewing the Planning Assistance Grant, but only for activities in relation to purposes beyond those presently being addressed. These activities may include, for example, technical assistance on design and implementation of preferred models for more developmental mothers clubs, and continued technical assistance on evaluation and on the design and implementation of Vitamin A projects.
8. USAID should consider that the Planning Assistance Grant has produced results much more likely than if individual grants had been made to PVOs, such as a) economies of collective assistance on matters of common concern, b) availability of a convenient vehicle for communicating with Cooperating Sponsors, c) improved collaboration among PVOs, and d) better identification of PVO deficiencies and appropriate help for reducing them.
9. USAID should recognize that ADRA and CARITAS will not reach high standards of management and development in the near future. Nevertheless, AID should accept their limitations and support the two agencies, provided they reach the minimum level of proficiency necessary for effective partnership with USAID. That level should take into account the Sponsors' inherent limitations.
10. USAID should consider monetizing commodities that become available as mothers club distributions decline, making proceeds available specifically for developmental non-food activities with clubs that are no longer receiving food.

K. ATTACHMENTS (List attachments submitted with this Evaluation Summary; always attach copy of full evaluation report, even if one was submitted earlier)

J. Pines and J. Lowenthal, SERVING TWO MASTERS: A ROCKY ROAD, A Mid-Project Evaluation of USAID/Bolivia Grant to Planning Assistance; USAID Project 511 - 0578 (G); La Paz, Bolivia; March.

L. COMMENTS BY MISSION, AID/W OFFICE AND BORROWER/GRANTEE

PLANNING ASSISTANCE COMMENTS

Planning Assistance greatly appreciates the evaluation performed by Mr. Pines and Ms. Lowenthal. Planning Assistance is in agreement with the recommendations of the evaluators and will implement them.

Planning Assistance does, however, note that the evaluators gave almost extreme attention to the "style" of the project and relationships between the Cooperating Sponsors, Planning Assistance, and USAID and failed, conversely, to address quantifiable achievements of the project's purposes and report on them. In addition, Planning Assistance believes that the evaluators were, on occasion, unnecessarily pessimistic as to the impact of their programs and that this pessimism was based upon experience with ADRA and CARITAS organizations in other countries and not a careful observation of the capacities and changes made by ADRA/Bolivia and CARITAS/Bolivia.

USAID'S COMMENTS

USAID concurs with Planning Assistance's comments that the evaluators concentrated too much on style and relationships rather than on developing recommendations which would help both Planning Assistance and the Cooperating Sponsors improve performance.

ATTACHMENTS

ATTACHMENTS

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# **SERVING TWO MASTERS: A ROCKY ROAD**

**A Mid-Project Evaluation of  
USAID/Bolivia Grant to  
Planning Assistance**

**[USAID Project 511 - 0578 (G)]**

**A Report by:  
James M. Pines and Janet W. Lowenthal**

**La Paz, BOLIVIA  
March 19-31, 1990**

SERVING TWO MASTERS: A ROCKY ROAD

A Mid-Project Evaluation of  
USAID/Bolivia Grant to  
Planning Assistance

[USAID Project 511-0578 (G)]

A Report by:

James M. Pines and Janet W. Lowenthal

La Paz, Bolivia  
March 19-31, 1990

## EXECUTIVE SUMMARY

This Report is a mid-term evaluation of AID Project 511-0578 (G), "Technical Assistance to PVD PL480 Title II." With a three-year OPG from USAID/Bolivia, Planning Assistance (PA) is providing management and technical assistance to three PVDs --CARITAS, Food for the Hungry International (FHI), and the Adventist Development and Relief Agency (ADRA) -- working with PL480 commodities.

Project goals are to increase agricultural production and reduce infant mortality in Bolivia, through achievement of the following project purposes:

O the extension of basic child survival services and assistance in improving agricultural production and income to the poorest members of Bolivian society;

O the establishment of three strong, well-managed, self-sufficient private and voluntary organizations (PVDs); and

O the assurance of effective management and utilization of PL-480 resources, principally the Title II commodities.

From its inception, the project had to address constraints that belied two key assumptions of the Logical Framework (attached). It soon became clear 1) that adequate funding was not necessarily available to finance the PVD transition from food distributors to development organizations and, 2) two of the three PVDs were not motivated to make this transition, largely because of their dependence on beneficiary income from Title II commodities. Moreover, initial emphasis on document preparation, made necessary by USAID's need to continue commodity distribution despite increased development emphasis, inhibited early Planning Assistance efforts to build appropriate helping relationships with Cooperating Sponsors. The Agencies perceived the management group primarily as an adjunct of USAID, rather than as an organization dedicated to serving their own needs. As document-related time pressures abated and the agencies came to value PA's contributions to their operations, relationships improved but still require further strengthening.

Planning Assistance has, to date, done an excellent job of delivering most Project inputs on schedule, with related outputs as expected. Only difficulty in finding and keeping an effective health consultant, and some delay in preparing manuals, mar an outstanding record. Planning Assistance has also delivered many other services not included in the initial Grant. For example, PA help in forming and guiding a Mission Monetization Committee, with

PVO participation, proved very time-consuming, but also very useful. An amendment providing for PA help in preparing and reviewing Vitamin A projects, though not directly related to initial project purposes, has also been executed with considerable success.

Progress in achieving Project purposes, though difficult to assess, also appears to be excellent. Most observers, including the evaluators, now perceive FHI to be a "self-sufficient development organization" as contemplated in the Grant. ADRA and CARITAS, though still clearly below that standard, are now more developmental and, with good progress to the end of the Grant, can reach self-sufficiency if that purpose is defined as "acceptable" rather than "ideal" management. It is still too early to observe progress toward the ambitious long-term Project goals.

The Report distinguishes between improving the developmental impact of current food distribution activities, and helping PVOs become development-driven organizations that may or may not distribute food. PA has had considerable success in making the PVOs more effective managers, but completing the task requires institutionalizing both training and fund-raising capabilities within the agencies themselves.

The Report also urges reconsideration of the development potential present among the more than 4,000 mothers clubs now receiving commodities through the Title II Program. The evaluators found that the food distribution contributes little to development, is accompanied by negligible development activity, and is widely acknowledged to create dependency. The Report encourages gradual transition from food-based clubs, to a network of womens' groups who receive commodities only as temporary incentive if at all, and engage in a manageable array of development activities. A national seminar or workshop, to identify feasible development activities for the clubs, merits serious consideration by USAID.

The transition to more developmental mothers' clubs can begin with the 20% reduction in the number of CARITAS Clubs receiving food, already programmed, using this as the basis for negotiating (e.g.) a 35% annual reduction among ADRA's 284 centers, since this will mean only a small decline in the total ADRA program. The Cooperating Sponsors will have ample time to seek other funding, should they chose to continue work with the mothers' clubs in the absence of distribution.

Based on these findings, the Report makes recommendations grouped under three headings: A. improving Planning Assistance's helping relationships with Cooperating Sponsors, through modifications in approach by both Planning Assistance and the Mission; B. improving the likelihood of self-sufficiency by giving high priority to the institutionalization of staff training

capacity within the cooperating Sponsors, so that changes initiated through FA efforts will be long-lived; and C. giving high priority both to helping Cooperating Sponsors seek immediate funding for non-food development projects, and to institutionalizing fund-raising capability within the agencies. Improved Planning Assistance collaboration with Catholic Relief Services and ADRA International will accelerate progress under the Grant.

The Report concludes that renewal of the Grant merits serious consideration: not for continuing work on original project purposes but, rather, for more ambitious and sophisticated purposes such as institutionalizing monitoring and evaluation systems, and building more advanced technical capacity within the agencies. These important continuing tasks would yield high returns in a Grant extension, if funds are available.

Additional recommendations, addressed to USAID, urge calculation of each Cooperating Sponsor's "development funding gap." By identifying the funding needed, after subtracting available monetization proceeds, to make each Sponsor an effective development organization at the current program level, and using PA to help Sponsors find non-AID sources, USAID will reduce both dependence on commodities and defensiveness toward smaller allotments. Filling the development funding gap will make Cooperating Sponsors more like development organizations that use food, as appropriate for reaching their goals. Since ADRA and CARITAS are likely to continue some existing developmental distributions, filling remaining development funding gaps should be feasible in Bolivia, if proposals emphasize development rather than food distribution.

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PARTIAL LIST OF PERSONS INTERVIEWED

## SERVING TWO MASTERS: A ROCKY ROAD

### A Mid-Project Evaluation of USAID/Bolivia Grant to Planning Assistance

#### I. INTRODUCTION

##### A. Purpose of the Evaluation:

This Report presents findings and conclusions of the mid-term evaluation of AID Project 511-0578 (G), "Technical Assistance to PVO PL480 Title II." Operating under a three-year OPG to Planning Assistance (hereafter called PA) from USAID/Bolivia (hereafter called USAID), the project provides management and technical assistance to three PVOs --CARITAS, Food for the Hungry International (FHI), and the Adventist Development and Relief Agency (ADRA) -- working with PL480 commodities. Save the Children subsequently became a recipient of PA services as well, when it became a subcontractor to FHI's Title II program, but no longer receives help.

Project goals are to increase agricultural production and reduce infant mortality in Bolivia, through achievement of project purposes:

0 the extension of basic child survival services and assistance in improving agricultural production and income to the poorest members of Bolivian society;

0 the establishment of three strong, well-managed, self-sufficient private and voluntary organizations (PVOs); and

0 the assurance of effective management and utilization of PL-480 resources, principally the Title II commodities.

This mid-point evaluation was carried out by James Pines and Janet Lowenthal between March 20-31, 1990, in La Paz, Bolivia. It is intended to be formative in nature, that is: to assess and analyze the results of the project so far, in order to draw conclusions that can then be used to more effectively direct the project's work during its final 18 months. The means for evaluating the project include extensive interviews with staff of

PA, the participating PVOs and USAID/Bolivia; review of project documents; and site visits to selected projects operated by PVOs assisted under the grant.

Cooperation from USAID, Planning Assistance, and the three Cooperating Sponsors was excellent. The evaluators encountered little defensiveness, and received excellent support in logistic matters. The collaboration of Lutgardo Aliaga, financial officer of Planning Assistance, merits special thanks. Without his help, evaluation deadlines could not have been met.

#### B. History of Grant

PA began work in Bolivia in March 1986, with an initial grant of \$25,000 from AID/Wash, \$58,500 from USAID/Bolivia, \$264,000 in Bolivian pesos from the PL480 Secretariat, and \$ from Planning Assistance itself. In accord with PA's earlier work in Peru and the USAID Mission's desire to see food aid used more developmentally, PA began to provide administrative and technical assistance to CARITAS, ADRA, Food for the Hungry International, and Servicios Nacionales (SNDC).

Following an evaluation in 1987 by AID, the three PVOs and the PL480 Secretariat, the project was extended under the present grant, for a total of \$1,300,000 for the period 6/30/88 through 6/30/91. The project has since been amended six times: five times to provide a total of \$435,000 in support of efforts to reduce Vitamin A deficiency, and once to change the effective date of the Grant Agreement.

The grants for Vitamin A activities cover technical and managerial assistance to CRS/CARITAS, FHI, ADRA, Project Concern International (PCI), and Save the Children, for helping them 1) integrate child survival, Vitamin A and vaccination components into their maternal and child health supplementary feeding programs, and 2) develop activities which integrate agricultural production and natural resource management into their food-for-work programs. Because the Vitamin A-related activities to date are both relatively recent and less consistent with activities of the original Grant, they lie outside the scope of this evaluation.

An additional grant of \$52,202 was made in December 1989 for PA to assist participating agencies in the establishment of monitoring and evaluation systems.

## II. ASSUMPTIONS, CONTEXT AND CONSTRAINTS

Full understanding of this evaluation requires careful consideration of the assumptions, explicit and especially implicit, of the Planning Assistance Grant's Logical Framework. The Project context also presents constraints that must be recognized, to

appreciate fully the Report's treatment of issues. The neat and appealing Logical Framework, though useful for conveying the Grant hypothesis, does not convey the complex and difficult Project reality.

A. Assumptions

As the Grant proposal and later documents emphasize, Project success assumes the following conditions:

1. continued availability of funding for PVO projects;
2. PVO motivation to carry out development work, or the existence of reward and punishment conditions that strongly encourage them to do so;
3. USAID willingness to fund, with food or money, only those projects that are truly developmental;
4. competent planning and management of genuine development projects;
5. technically correct projects, implemented in adequate and appropriate fashion.

The last two assumptions make explicit the links between outputs and purposes in the Project hypothesis. However, "competent planning and management" is too general a standard. Desired end-of-project status can usefully be made more operational, such as "able to write an MYOP that is timely and acceptable to USAID, without outside assistance." Self-sufficiency also requires institutional staff development and fund-raising ability. The other three assumptions, however, go to the heart of a) converting a food-driven Title II Program into a set of development-driven projects supported by donated commodities, and b) turning three Cooperating Sponsors into development-oriented "self-sufficient organizations able to manage their own affairs without recourse to external assistance."

The assumption that continued funding for development projects would be available needed clarification. It was soon clear that monetization and other AID sources, even if devoted exclusively to development, would not be sufficient to make food distribution developmentally adequate at existing program levels. Since PVOs resisted reduction, the availability of outside funding became critical. Outside donors, however, resist funding PVOs perceived as food-driven. The more accurate assumption, implicit in seeking self-sufficiency, is that cooperating sponsors know how to, or can learn to, secure sufficient development funding, from USAID and other sources, to maintain current program size or a reduced level acceptable to them. Though not correct at project inception, this assumption now seems reasonable. The new

assumption, as the rest of the Report shows, contains important implications for modifying the Planning Assistance approach.

The Cooperating Sponsors, surviving comfortably with traditional feeding programs, greeted the new Title II emphasis on development with mixed emotions. Their incentives to "become developmental" suffered from lack of knowledge, honest differences in view of mission, and the uncertain financial future being offered. Understandably, USAID efforts to impose new attitudes on the PVOs sometimes produced formal compliance, rather than whole-hearted conversion.

Planning Assistance's overly optimistic assumptions about PVO motivation, which had not taken into account the concern for commodity income, soon forced reconsideration of Project activities. Improving development motivation came to be viewed, quite properly, as a requisite for success of other activities. For reasons apparent in reviewing the Grant context, such improvement has been a greater challenge than anticipated.

#### B. The Context

CARITAS and ADRA, the two PVOs most concerned to maintain commodity levels and most ambivalent about development, became PA clients because of historical accident. Both had become mainstays of traditional USAID emergency and regular feeding programs, before the new focus on development. Their structure, skills, interests and motivations stem primarily from their earlier involvement in food distribution. The Grant purpose of "turning them around" assumes, implicitly, that organizations staffed for traditional commodity distribution can learn new skills and acquire new motivations.

Planning Assistance did not choose its clients. Nor did the clients initially seek PA help. Rather, all were part of an USAID context that forced their collaboration. The impressive PA and PVO accomplishments described in this Report, as well as the remaining gaps, are likely to be viewed differently, when these circumstances are considered. Too often, the PVOs still view PA not primarily as their consultant, but as an arm of AID or as an independent PVO with an agenda of its own -- a perception stemming from the origins of the consulting relationship.

USAID, PA and the clients also began work within a "document-driven" management context. Despite genuine concern for improving substantive management and making the PVOs "efficient Partners," the USAID had to give priority to adequate and timely document presentation, to keep the evolving Title II Program alive. Management assistance had to focus directly on (e.g.) preparation and submission of development-oriented Multi-Year Operating Plans (MYOPs) and proposals for use of monetizations proceeds, rather than on changing ways of thinking about development and management.

Though assisting in document preparation added to PA credibility, and responded to USAID needs, the emphasis on paper and the pressures of deadlines discouraged effective consulting and added to existing cynicism about USAID requirements.

Vestiges of the cynicism remain. For example, the evaluators were prepared to compliment PA because the Diocese of Santa Cruz, which had previously rejected consulting help, recently solicited assistance. While perhaps a modest tribute to PA's reputation, investigation indicated that, after having a plan returned for revision, the Diocese Office perceived, with a nudge from USAID, that a little PA consulting would expedite approval.

The emphasis on documents actually forced Planning Assistance into writing an MYOP for a client, unthinkable in a consulting relationship ostensibly existing to build client capability. Concern for meeting USAID presentation and reporting requirements continues to complicate the consulting task, making it difficult to tell whether clients really have changed their ways of thinking or just want to keep AID happy.

The Project context also includes USAID use of Planning Assistance for various tasks not contemplated initially. For example, the consultants played a key role in establishment and operation of the Mission Monetization Committee. The consultants identified many other tasks that suggest USAID reliance on them for convenient communication with the Cooperating Sponsors. Some of these assignments, including aspects of monetization, compromised the consulting relationship and made PA's task more difficult. Though accompanied by increased funding, USAID's requests for new initiatives, on Vitamin A and Evaluation, also taxed the capacity of Planning Assistance and the Cooperating Sponsors. USAID's substantial reliance on Planning Assistance, though still evolving and sometimes adding to confusion about roles, remains a positive aspect of the Project. It is mentioned to indicate that the context converted much PA activity into something quite different from what was described in the Logical Framework.

The existence of traditional (i.e., not "developmental by USAID standards") food distribution programs, an important aspect of the Grant context, presents both opportunities and constraints. In most cases, there were possibilities for "using food developmentally." At the same time, the attitudes, skills and interests associated with current programs constrained the possibilities for rapid transition to better managed, more developmental activities. Indeed, their high initial program levels encouraged ADRA and CARITAS to say "we'll keep all our beneficiaries, but make our programs more developmental and better-managed." USAID and Planning Assistance replied, "No, you have to reduce the number of beneficiaries in order to improve the quality of development and management." PVO staff, concerned that reducing

food distribution would eliminate jobs and constituents, resisted developmental initiatives accompanied by diminished use of commodities. The recommendations in this Report seek a compromise between the desire to maintain funding, and the need to improve management and development impact.

### C. Constraints

The emphasis on reducing numbers and tonnage masked significance of the development funding constraint. USAID seeks increased development activity, but is not prepared to finance all the complementary costs associated with it, at current beneficiary levels. Reducing the number of recipients diminishes the financial constraint, but increases PVO resistance. The absence of sufficient USAID funding, even with monetization, creates a constraint that makes necessary some combination of reduced food distribution and increased funding from other sources. If Cooperating Sponsors want to maintain program levels, they will have to find more money outside AID.

Because ADRA and CARITAS, building participation, distributed food in many different kinds of projects, the diversity of activities and the difficulties of terminating them also constrained Planning Assistance efforts. Both management and developmental improvement would have been easier with less variety.

The constraints imposed by PVO attachment to the past and ambivalence about development include influences from executive levels that neither USAID nor PA can affect. Attitudes of the Catholic Bishops, key decision-makers for CARITAS, and ADRA's governing board in Lima (the Union Incaica), limit significantly any efforts to improve development impact, though neither group is monolithic in view or completely intransigent. It is clear, nevertheless, that no matter how effective PA assistance may be, the motivations and attitudes of ADRA and CARITAS are, to some extent, beyond reach of the Project.

Staff turnover, especially at ADRA, presents a further constraint. Although departure affords opportunity to hire new people, better prepared and more oriented to development, ADRA has not been able to find them. Planning Assistance is now assisting efforts to improve recruiting. To date, the 40% annual turnover in regional offices, acknowledged by ADRA, limits sharply any institutionalization of new management practices, and places a high premium on developing staff training capability within the PVO.

In the following summary of inputs, outputs and achievement of purposes, the foregoing discussion provides useful perspective and assists in identification of activities and results not contemplated initially. The context and constraints also influenced heavily the recommendations of this Report

### III. ACCOMPLISHMENTS UNDER THE GRANT

#### A. Delivery of Inputs and Outputs

The project anticipated the delivery of an ambitious set of inputs and outputs, in the form of managerial and technical assistance that would improve the long-term capacity of the participating agencies to plan and implement developmental activities using PL480 resources, including both food and the proceeds of monetization. The distinction between "management" and "technical" help is often fuzzy, because technical backgrounds of PA consultants enable them to address both management and technical matters simultaneously. The inputs and outputs set forth in the original project, targets to be achieved by project completion, and progress through February 1990, are summarized in Table I, "Delivery of Inputs and Outputs". The multitude of documents produced by PA for use by the participating agencies during the project's first 18 months is presented in Appendix 1.

Input 1 -- Training in Program Management Practices: PA's management assistance was most rapidly and effectively assimilated by FHI, thanks to its receptivity to such training, and early contact between the two organizations. PA's management training for FHI actually began before the current grant, with one of PA's core professionals spending two years as a "resident advisor" at FHI.

The management training approach pursued here originated within FHI itself (over initial objections from PA), and proved exceptionally effective, namely: to provide on-going, intensive training for the organization's ten senior managers, from the national and regional offices. According to the current director, the entire organization became infused with the new practices and techniques, through a process of "spontaneous replication." Specific training courses on practical management theory (e.g., use of time, making work plans), as well as assistance in conceptualizing and producing Annual Operating Plans, were also deemed extremely helpful.

The organization's interests for the next 18 months lie in further strengthening its training, monitoring and evaluation capabilities. FHI believes PA could be of some assistance here. FHI requires little in the way of assistance with financial management needs, with the possible exception of PA's help on cost accounting.

The path has not always been so smooth with CARITAS and ADRA, although both place high value on most of the managerial assistance offered by PA. Within CARITAS, PA training workshops have for the most part been well-received, with the caveat that more follow-up is essential to reinforce and institutionalize workshop content,

# TABLE 1

## Delivery of Inputs and Outputs.

	Target	Cumulative thru 2/90	Per Cent
1. 537 persons trained in program management practices			
- long-term planning	80	57	71
- annual planning & budgeting	174	314	180
- organizing & staffing	114	94	82
- directing & controlling	66	102	155
- computerization of tracking & control of Title II food	13	32	246
- training in managerial attitudes, skills, and tools	--	10	--
2. Production of 5 manuals on program management practices	5	5	100
3. 360 PVO staff trained in design & implementation of child survival and agricultural projects	360	79	22
4. Production of 7 technical manuals on designing and carrying out child survival & agricultural projects	7	2	29
5. Resolution of critical management problems of the three PVOs	12	8	67
6. Technically satisfactory design & implementation of child survival & agricultural programs	72	8	11

to put theory into practice. In addition, FA has provided substantial direct assistance in producing MYOPs and Annual Operating Plans to three of the sixteen CARITAS diocesan offices, helped three others with other child survival concerns and provided occasional help to at least four more.

Within ADRA, the management mechanisms and practices taught by FA are now in use within the agency, but still require substantial promotion and reinforcement. To encourage this process, FA (with extensive involvement by ADRA staff) produced a detailed Operational Manual for ADRA/Bolivia. This Manual is already proving helpful to the agency's top four officers; when modifications have been completed (by 4/9/90), ADRA plans to implement the manual within all levels of the organization by May, 1990.

Input 2 -- Production of Five Manuals on Program Management Practices: The Operations Manuals were originally intended to support workshop training, and the impact of FA management training would clearly have been strengthened had all manuals been available in conjunction with the workshops, as planned. Due to delays in producing these guides, only those on Annual and Multi-Year Planning are now in use. However, the remaining ones have now been written and are awaiting finalization. The completed volumes should be very useful for reinforcing PA's workshops, by giving participants (and other staff, present and future) a permanent reference.

Input 3 -- PVO Staff Trained in the Design and Implementation of Child Survival and Agricultural Projects: PA has been slower in providing the technical than the management assistance planned for under the grant. Staff with primary responsibility for the technical workshops were hired only in the latter part of the first project year, and two successive health specialists proved unsatisfactory and had to be fired. In any case, management assistance was a prerequisite for getting projects to the point where they could benefit from technical help. In recent months, the allocation of PA time and resources has been gradually shifting toward more technical assistance, particularly with staff involvement in helping several CARITAS regional offices to develop their agricultural programs, and in ADRA's integrated agricultural development programs. PA's increasing emphasis on technical assistance should become even more pronounced during the latter half of the grant.

Input 4 -- Production of Seven Technical Manuals: Although the production of technical manuals has lagged behind schedule, all are now in final draft, having been prepared with considerable input from participating agencies (and, in the case of Urban Infrastructure, from municipalities involved in urban food-for-work projects). A major part of PA's work over the next 18 months will be to introduce and reinforce the use of these valuable materials.

Input 5 -- Resolution of Critical Management Problems: PA has evolved a role that allows it to serve as an "honest broker" between cooperating sponsors and their Bolivian counterparts. For example, interviews at Accion Comunal and the Municipal, German-supported reforestation program, revealed that Planning Assistance had helped ADRA and the executing agencies resolve several critical management problems. The identification and resolution of critical management problems does not lend itself easily to formal input and output measurement. Nevertheless, discussions with PA staff and other interviews support identification of an unusual and productive Planning Assistance role.

Input 6 -- Technically Satisfactory Design and Implementation of Child Survival and Agricultural Programs: Lacking a permanent health specialist, PA has been unable to comply fully with its original TA goals in health. Nevertheless, PA was able to deliver help to 6 of the 16 CARITAS offices in annual planning and budgeting for their Child Survival program. PA has also provided some limited technical support to FHI's Child Survival programs, once CARE's technical assistance arrangements with FHI in this area were terminated. PA is not now actively recruiting a health specialist. It probably doesn't make sense to seek a full-time person at this stage of the grant, although short-term consulting services of a nutritionist or public health specialist might prove useful.

Additional Outputs: In addition to work in fulfillment of the original Grant, PA has also taken on significant additional tasks. These include:

a) Monetization: At USAID's urging, PA provided extensive assistance to all four participating agencies in preparing plans for monetizing commodities in FY89. In addition, PA designed and wrote the plan for establishing a common monetization program and fund. Finally, when the monetization program was approved in January 1989, PA helped the agencies establish an inter-agency committee to supervise commodity sales, control disbursement, and monitor project and program achievements. The help consisted of assistance in writing the procedural manuals for the committee and its subcommittees, as well as hiring a manager for the program.

b) Urban Food-for-Work: In February-March, 1989, PA provided extensive help to the municipality of La Paz and ADRA, in designing and planning ADRA's urban improvement (food for work) in La Paz. The project provided short-term employment for 5,000 people throughout 1989, with construction of drinking water, sewer construction and forestation projects in the La Paz Valley.

c) Vitamin A: Under this Amendment, Planning Assistance serves as a conduit for USAID funds, allocating resources after conducting a review process, to sub-projects presented by FVDs

working in health. The group has also conducted two five-day seminars to orient PVOs to problems of Vitamin A deficiency, and assisted them to plan activities for alleviating the problem, integrated with their other health work. Planning Assistance provided help to Save the Children in developing plans for project activity in Yucumu. The Director of Save the Children states that early termination of the project resulted from staff deficiencies in his organization, and reiterated his respect for the help given by Planning Assistance.

#### B. Achievement of Purposes and Goals

The log frame's hypothesis is that improved managerial and technical practices will translate into increased institutional capacity to implement effective health and agricultural programs. Even under the best of circumstances, however (i.e. without the constraints imposed by the project context), it is difficult to attribute all outcomes to PA efforts. Nevertheless, at mid-point this project appears already to be contributing significantly to project purposes, although the pace of progress differs among the participating agencies.

FHI is today the most mature and development-oriented of the three. When it first began to work in Bolivia during the '83 drought, it saw itself as purely an emergency relief organization. The change in overall orientation came about through processes and perceptions internal to FHI leadership. However, the ability to implement the change in orientation is attributable, in good measure, to help received from PA.

Management improvements have had their most concrete impacts on FHI program performance, by enabling FHI to focus its efforts more sharply, consolidate existing programs, and reduce the number of projects, types of projects, and communities receiving assistance. For instance, FHI originally worked in 250-300 communities, but is now working intensively in only 100 (with about 100 more receiving modest support). The agency's original 40 food-for-work projects have been pared down to seven and, now, to one. Mothers' Centers now operate in 100 communities, instead of the original 200. According to FHI's Director, this program consolidation will now allow FHI to undertake the monitoring and evaluation, as well as the training, that the agency has wanted to do for some time.

At the present level of operations, FHI is clearly a "self-sufficient" organization as defined under the grant, "able to manage its own affairs without recourse to external assistance." However, because FHI seeks continual growth and improvement, intermittent assistance may still be useful.

ADRA, too, reports significant program impact attributable to

managerial improvements. Like FHI, it too emphasizes the positive effects of focusing efforts and resources on fewer types of projects, in order to increase impact through fewer but better-designed, better-supervised and complementary interventions. For example, whereas ADRA used to operate 25 types of rural projects, thanks to PA's influence it is in the process of reducing them to only six. The number of Mothers' Clubs has been reduced from 250 to 140, despite pressure to maintain numbers for financial reasons.

A site visit to the Cohoni project, one of ADRA's integrated rural development projects, indicated excellent progress during the project's first six months, with promise of significant development impact. Working relationships between PA and ADRA staff, and between ADRA staff and community promoters trained by ADRA, appeared productive and cooperative. Despite the initial reluctance of many local farmers to participate in the project, persistence by both PA and ADRA staff is paying off as more farmers (and additional communities as well) are asking to join. Moreover, community commitment to this project is now strong even in the absence of the food distributions that ADRA used to make in this region. ADRA/LaPaz staff members interviewed in Cohoni attribute ADRA's ability to design and begin implementing this project to the managerial and technical assistance provided by PA. One staff member went still further, declaring that PA's involvement "has revolutionized ADRA, because this isn't the same organization that I joined three years ago." He added, however, that not all staff in ADRA/LaPaz share the development goals of the "revolution."

The major contribution of Planning Assistance, in work with CARITAS, to project purposes has been the decentralization of planning to 16 Diocesan offices. Because each office presents distinctive management problems, overall progress toward project purposes has understandably been slower than with the other two Cooperating Sponsors. The recent decision of the Catholic Bishops to cooperate in reducing the number of food distribution beneficiaries in the mothers club program, presents tangible evidence of Planning Assistance impact. Current plans for reduction, for which criteria were developed by CRS, also reflect PA management assistance. By selecting six Dioceses for priority attention, Planning Assistance has been able to achieve measurable impact. Unfortunately, to match these accomplishments in all other Dioceses would require many years of PA help. To do so more effectively, Planning Assistance will be obliged to work through the newly strengthened National Caritas Planning Office, and its four new regional technical support offices. Since CRS assumed responsibility for preparation of the CARITAS MYOP, Planning Assistance was less involved than with ADRA. Indeed, the support and work of CRS makes it difficult to isolate and attribute some PA impacts.

PA management training, both through its workshops and its more direct, hands-on assistance, has also contributed to project

purposes in ways not always easy to quantify. However, anecdotal evidence suggests a qualitative impact in terms of confidence building and growing institutional capability. For example, one ADRA staff member believes that the Agency's adoption of new internal management mechanisms has given ADRA "the confidence to see what else they can do." Even more gratifying is a testimonial from the Director of FHI's M Jire/Nino Program. Specifically on the basis of the problem-solving approach presented at a recent PA seminar, she was able in two days to prepare a proposal for UNICEF addressing a critical gap (the cold chain) in her FHI program!

The project's third purpose was to assure effective management of PL480 commodities. In Bolivia, the food is delivered directly to regional warehouses, at no cost to the FVOs, where it is then picked up by the beneficiaries. Therefore, the logistics of food management are far simpler than in other countries, and effective management has not been a major concern, despite occasional slip-ups. PA contributed to further management effectiveness by producing in 1989 an Operations Manual for simplifying the computerized food-monitoring system already in use.

Neither ADRA nor CARITAS has yet obtained the level of self-sufficiency defined under the grant. However, depending on the minimum acceptable level of managerial adequacy, as defined by AID for continued qualification as a Cooperating Sponsor, there remains a reasonable possibility that both can become self-sufficient by the end of the Grant period.

It is premature to evaluate the extent to which the project will attain its goals of reducing infant mortality and increasing agricultural production. Real changes in these indicators are unlikely to be realized for several years.

### C. PA Staff and Internal Management:

All of these activities were accomplished by an exceptionally well-qualified and dedicated team of five professionals, plus highly competent consultants hired to meet specific short-term needs. The core staff consists of two economists, one agronomist, one accountant and one architect-urban specialist. A talented draftsman, who also assists in consultations, and a nutritionist, who works full-time on the Vitamin A Grant, complete full-time professional staff.

The participating agencies are far larger: ADRA has a full-time staff that fluctuates between 95-100; FHI has at least 90 staff members, while CARITAS, including the national office and the 16 diocesan offices, easily exceeds five hundred. Employee numbers change often among the Cooperating Sponsors, because employment is often tied to specific projects with time-limited funding. The turnover associated with ending of projects makes the Planning

Assistance management improvement task more difficult. Project-oriented employees, not viewing themselves as permanent, frequently respond less satisfactorily to help. The three PVDs distribute nearly 41,000 tons of food, in programs that serve over 575,000 beneficiaries.

If PA staff, now working close to capacity, could concentrate exclusively on activities included initially in the Grant, the relationship between consultants and clients would be appropriate. The impressive outputs achieved by the team justify careful attention to giving PA optimum support during the rest of the Grant period. As AID adds amendments, it is important that PA receive sufficient staff and funds to maintain the integrity of the management assistance team.

One highly visible component of PA technical assistance is its excellent graphics. Useful and instructive though these may be, however, they may send misleading messages to clients. PA should make sure its clients understand that good graphics do not a good project make -- nor, on the other hand, that the absence of visual aids means project inadequacy.

PA's internal management includes rigorous systems of time-keeping, financial accounting, work planning, and other important management tools. Self-evaluation and internal communications leave little to be desired. Also impressive is the participatory management style. The driver and the porter, for example, show unusual grasp of Grant purposes and clearly consider themselves members of the team.

Although PA responds vaguely on the current absence of recruitment of a physician, most other aspects of Grant planning and implementation are excellent. The management assistance group cannot be accused of saying "do as I say, not as I do." Their management systems, and use thereof, are the best advertisement for their services. However, important questions about managing the relationship between the group and its clients merit attention, and are discussed later in this Report.

#### D. Conformity to USAID/Bolivia Objectives:

The Scope of Work requires that "the evaluators should analyze the extent to which current PVD programs conform to USAID/Bolivia objectives." There is no question that the purposes and goals described in the initial grant, the management assistance activities of Planning Assistance, and the accomplishments resulting therefrom, conform entirely, and contribute dramatically, to achievement of USAID/BOLIVIA objectives in health, agriculture and Title II. Better-managed Cooperating Sponsors, more developmental food distribution activities, and increased integration of commodity distribution with activities in health

and agriculture, all progressing during execution of the Grant, support USAID objectives. Improved control of Title II commodities, another purpose of the PA Grant, has received little attention, because the food-driven Cooperating Sponsors have, after many years, mastered most details of the process. Nevertheless, Planning Assistance has helped to improve Title II controls and this, too, fits well with matters of concern to USAID.

#### IV. ISSUES

The evaluation disclosed several issues that go well beyond narrow assessment of the Grant. It is often difficult to distinguish the relationship of particular issues to USAID and Planning Assistance, since their intertwined roles force examination of most issues in respect to both. Some issues arise from constraints inherent in Title II programming, but both USAID and Planning Assistance can do much to alleviate pressures arising from the project context. Issues related to the mothers' clubs food distribution program are also development planning issues. Indeed, the entire issue discussion stems from exploration of the transition problem, taking Cooperating Sponsors from food-driven programming to more authentic development.

##### A. Serving Two Masters: The Issue of Style

Although Planning Assistance is generally perceived favorably and is universally respected for competence, various negative views, sufficient to impede progress significantly under the Grant, should cause concern. All three Cooperating Sponsors had trouble negotiating initial work plans with PA, partly from their own inadequacies. They also resented what they perceived as an USAID imposition. Planning Assistance apparently aggravated difficulties by pushing very hard for what it deemed appropriate. The Director of FHI described, with some pride and without hostility, how he got PA to accept his equally acceptable planning process. Despite any initial discord or current reservations, all Cooperating Sponsors continue to seek management assistance.

The PA consultants are widely perceived as able, dedicated and high-powered, but also as "too theoretical," "not really field people," and "too close to AID." Discounting for the inevitable resentments of most consulting clients, especially when the service is seen as imposed, PA and USAID should still take heed. To be most effective, the providers of management help must be perceived as serving the client. Furthermore, the helping relationship is incompatible with "waving AID's big stick," evaluating or auditing the client, or (the Vitamin A role) allocating limited resources in which the client hopes to share. The sound of "I'll help you get the food" differs sharply from "Do what I say or you won't get it." Partly because of the USAID context, but also through its own

backsliding, Planning Assistance often seems to be saying the latter.

The recent seminar on Monitoring and Evaluation Systems illustrates the importance of tone and style. Dated February 22, 1990, the USAID invitation to Cooperating Sponsors said, in part:

"AID, in Washington and Bolivia, attach the highest priority to establishment of monitoring and evaluation systems for Title II programs in this seminar"....and "Your participation in this event is of the greatest importance for the future of the program, and for this reason your attendance is imperative." (underlining added)

On March 2, Planning Assistance sent a milder communication, saying:

"Enclosed for your consideration are evaluation and monitoring formats....We would thank you for sending us suggestions and any results of testing the system, to improve the draft and help us..." (free translations)

Although the FA approach is better, both communications show little concern that the Seminar be perceived as for the benefit of the Cooperating Sponsors. This may seem like nitpicking, but, in a day, the evaluators picked up enough resentment to nullify even PA's modest request. In fact, the PVDs viewed PA as imposing what USAID wanted, rather than as responding to their needs. Acceptable and useful Title II evaluation systems will emerge when PVDs want them, not because they are a formality for getting commodities. Until USAID and, to a lesser extent, Planning Assistance treat the PVDs as collaborators, management assistance services too easily receive only "going through the motions" response. Though perhaps not an ideal arrangement, Planning Assistance should at least be viewed as the "good cop" ("I'm here to help you"), if USAID must continue to be perceived as the "bad cop".

Converting near-adversary relationships into collaborative ones requires considerable humility, self-restraint and ability to live temporarily with imperfection. Collaboration means hearing and listening to the "inquietudes" (preoccupations or concerns) of clients, yielding occasionally when still in doubt. However, if USAID and PA can begin improving collaboration immediately, the next 18 months can produce even more outstanding results.

The consultants can continue pressing for reduced diversity. They can also, for example, help ADRA and CARITAS accommodate to projected reductions in mothers' club distributions. However, a more collaborative style requires that these steps be perceived by the Cooperating Sponsors as PA services to them, not as PA carrying out the imperatives of AID.

As Planning Assistance seeks to institutionalize current accomplishments, differences of style will become even more important. The FA consultants, who indeed are dedicated, competent and high-powered, but also occasionally too theoretical, will be perfect for "training the trainers" who will bear the burden of completing FA's work. Equals will be working with near-equals. Although PA could probably do field work pretty well, it is inefficient and the PA staff's talents would be wasted at the less sophisticated field levels.

The evaluators well recognize the documentary imperatives and often incompatible goals involved in running a Title II program. They know, too, the frustrations and difficulties of working with PVOs, who often do not share USAID goals. Nevertheless, to make the Planning Assistance help and the Title II Program more effective, USAID can do much to reinforce the collaborative style so essential for success.

#### B. Using Food Developmentally or Creating Developmental Organizations ?

It may be helpful for USAID and Planning Assistance to consider the differences between helping PVO's to "use food more developmentally" and assisting them to become development organizations. Although PA management assistance serves well in either case, the differences affect USAID guidance to the consultants, and their response.

For example, ADRA uses food very effectively in the Accion Comunal Urban Works Program and the GTZ (German aid)-assisted Valley Reforestation Program. However, the PVO only implements and monitors use of food for work. Interviews at both programs confirmed that ADRA technical input relates primarily to checking payment of the food incentive against progress of the work, and selecting projects considered appropriate for developmental use of commodities. As with CARITAS and the mothers' clubs, being the food distribution agency causes ADRA to be perceived as a food, rather than a development, organization. Such perceptions make it difficult for ADRA and CARITAS to present themselves as development agencies, when seeking funds for non-food projects.

As the USAID considers the appropriate balance between commodity distribution and monetization, it must decide how much "using food developmentally" and how much "development financed by sales and unaccompanied by distribution" it seeks. The Cooperating Sponsors, too, need to consider the same balance.

It is paradoxical that to do development work, instead of supporting it with commodity distribution, requires almost forgetting about food. For example, making the mothers clubs more

developmental is now seen, by most of those involved, as meaning the end of routine distributions. Making ADRA and CARITAS more developmental also means financing activities in which food distribution is, at most, incidental. This is especially true in Bolivia, where opposition to food aid seems much stronger than in most places. Monetization, alone, is not likely to be enough to fill the funding needs of PVO's seeking to become development organizations, though specific calculations will be necessary for each Cooperating Sponsor. Only by providing enough development funds, or helping PVOs obtain them elsewhere, can USAID end Sponsor dependence on it and eliminate the pressure to maintain current levels of commodity distribution, for financial reasons.

Increasing "use of food developmentally" reduces the funding gap for making the Sponsors into development organizations. The PVOs now favor non-food development programs, if they can get money for them. USAID and Planning Assistance contributed to creation of this posture. Because the Cooperating Sponsors are still needed, to distribute commodities in FFW projects and in emergencies, the Food for Peace Office will be well served by collaborating with the PVOs, to evolve a balance that continues the process of making them into development organizations. Approached in this way, resistance to phasing out of mothers club distribution, for example, can be eliminated.

The Bishops' negotiating position, trading beneficiary numbers for equivalent monetization, reflects implicit understanding of the position recommended here. If CARITAS can be helped to find development resources outside USAID, phasing out of mothers club distribution should present few problems.

The foregoing discussion still leaves room for USAID to let ADRA and CARITAS know that projects considered marginal to an acceptable development strategy will not be renewed. With plenty of notice, both agencies will have time to adapt and reconsider current program plans. This approach contrasts sharply with what has been perceived as a USAID desire to impose immediate and extensive cuts.

Any USAID resentment at financing management assistance to help Cooperating Sponsors obtain funding from other donors, can be defused by treating the expense as part of the cost of maintaining the food distribution network needed for emergencies. Emergency preparedness considerations justify some relaxing of rigor in seeking more developmental Title II activities. If Cooperating Sponsors are moving toward development, with or without food, occasional funding of less-developmental distributions, to preserve the emergency network, can occur without jeopardizing the Title II developmental goals.

### C. Reducing Diversity

ADRA's 1990-1992 MYOP describes a) Rural Integrated Projects, b) Rural Infrastructure Through Food for Work, c) Urban Infrastructure and Short-term Employment through Food for Work, d) Womens' Program, e) School Feeding and f) Humanitarian Assistance. The 1989 Tarija Diocese CARITAS Operating Plan identifies at least eight "sub-programs." This kind of diversity would tax the management skills of many a substantial corporation and is clearly too much for the two agencies. Furthermore, long development experience confirms that trying to do a little bit for too many often winds up doing very little for any. Nevertheless, because ADRA and CARITAS are still food-driven for financial reasons, they resist reducing their diversity, though PA help has already had some impact. Reduced diversity will come more easily when the PVOs understand the meaning of strategy, and know how to design a fundable one. The same program level becomes easier to manage, when all projects are related to each other and to a common goal.

Being food-driven produces a collection of "projects" that do not constitute a development strategy. However, Cooperating Sponsors who are concerned with maintaining program size lack the freedom to seek alternatives, if threatened with reductions in food distribution and beneficiary income. To make the transition to development strategies and programs, they need help in finding other funding sources while beneficiary numbers are intact. Indeed, a realistic strategy flows, in part, from accommodating to concerns of donors that are not interested in distributing food. In very simple terms, the development strategy is a group of related activities addressed to a common goal. Finding donors who share the PVO goal is part of transition.

Planning Assistance staff understand development planning. ADRA and CARITAS understand it less. Even once they understand it better, the PVOs will remain hostages to Title II unless they are freed by monetization and other new funds. Only when they feel able to seek funds for non-food activities, without fear of simultaneously losing beneficiary income, will they enjoy the luxury of strategy development. With growing concern for manageability, and recognition of the synergism needed for consequential progress toward goals, their unwieldy project diversity will erode more naturally. Planning Assistance has already had some success in pruning programs and shaping those remaining into a strategy. Helping the Cooperating Sponsors find alternative funding sources will accelerate the process.

#### D. Saving The Mothers' Clubs:

Over the past twenty-five years, the network of Mothers' Clubs receiving Title II commodities has grown to about 4,000. USAID/Bolivia now distributes about one-half of all Title II commodities through the clubs. The volume of food, by agency and number of clubs, for FY1990 is shown in Table 2. It is widely acknowledged that, despite a few impressive exceptions, these

TABLE 2

Agency	No. of Clubs	No. of Women	Kg./ Ration	No. of Child-dren	Kg./ Ration	No. Mos.	Total Kgs.
FHI	200	10,000	5.8	10,000	5.8	12	1,392,000
ADRA	260	14,000	5.8	23,252	5.8	12	2,592,739
CARITAS	3,428	78,382	5.8	156,764	5.8	12	16,366,000
Total	3,888	102,382	5.8	190,016	5.8	12	20,350,739

clubs are not "developmental"; many critics go further, charging that they encourage "dependence" on donated food. In fact, antipathy to food distribution is unusually vehement in Bolivia. These factors have led USAID, some PVOs and even beneficiaries themselves, to question the merits of continuing food distribution through the clubs.

At the same time, USAID is not opposed to continue providing food if the clubs become more developmental. However, it is willing to finance only a portion of the additional costs required to effect this conversion. While other donors may be willing to help close the funding gap in support of "good projects, there is little agreement about what "development-oriented" mothers' clubs would actually do.

Recent attempts to use the clubs as a vehicle for promoting oral rehydration and other child survival interventions have proven less than satisfactory, in part for lack of adequate funding for training and other complementary needs. A Dutch-sponsored mothers' literacy course was undermined by competition from food distribution to neighboring clubs. ADRA is accused of forcing women to "sit for three hours" in return for the food, to prevent them from joining other clubs. Title II requirements restricting food distribution to women with children under six, while nutritionally motivated, are blamed for turning Mothers' Clubs into divisive entities.

On the other hand, there is no shortage of ideas for what might work to give Mothers' Clubs more developmental impact. Income-generation and credit activities are cited frequently; CRS sees good possibilities for involving rural clubs in small-scale agriculture and rural works; community kitchens ("comedores") could be established similar to those supported by Title II in Peru. More generally, hopes still abound for using Mothers' Clubs to provide entrée to the community, deliver training and literacy, reach nutritionally vulnerable children, build democratic attitudes, empower women, establish day-care centers and solidarity groups for small-scale credit. Also noteworthy is the "platform" endorsed by 4,000 women from all over Bolivia, who assembled in the stadium in October 1989, seeking changes in the rules governing donated foods, and training to help them become independent and productive.

In summary, at this juncture many in Bolivia are urging AID to drastically reduce and eventually phase out food distribution to the Clubs, on grounds that food donations and developmental objectives are mutually exclusive. Others, for humanitarian, institutional and financial reasons, are reluctant to discontinue Title II distribution to the Clubs, and continue to cite their "obvious" though still largely unrealized development potential.

One way to address this impasse is to ask not "How can the Mothers' Clubs use food more developmentally?" but, rather, "How

can the Mothers' Clubs become more developmental?" If food can help to achieve this goal under particular circumstances, fine -- but it should not be a given. In particular, a role for food may persist in the poorest communities, or in cases where previous services were poor and food can induce women to try them again. The main point is that all concerned -- USAID, participating agencies, beneficiaries themselves -- must keep reminding themselves which is the tail and which is the dog.

One question looms unanswered: how many women would be willing and able to attend Mothers' Clubs, if they couldn't bring home any food? The near-universal perception in Bolivia is that habit, need and opportunity costs have made food an essential requisite to induce attendance -- at least initially. The challenge is to devise activities that produce sufficient benefits (e.g. income, or skills and knowledge that respond to felt needs) enabling women to justify -- to their husbands and themselves -- participation at meetings in the absence of food. There will inevitably be some attrition if food is withdrawn, but the remaining members/clubs will be more motivated to pursue development activities.

Food distribution need not be an either/or option. It can be used as a temporary incentive for innovation and bringing women together. For example, once a development plan has been made, implementation is underway, and the anticipated development benefits are beginning to materialize, the food itself can be withdrawn and monetized instead. The proceeds can then be used to help finance continuing development activities.

In Bolivia today, there is a "new wave" of efforts, under the auspices of FHI, CARITAS, ADRA and others, to test the clubs' potential to achieve development impact by including health, literacy and income-generating components. However, many such efforts appear likely to be limited by the groups' large size and heterogeneity, and the inadequate ratio of staff to members. Moreover, some ADRA and CARITAS attitudes toward the clubs may also inhibit the prospects for development impact. Although occasional success stories are reported (e.g. an ADRA group bought an oven and now sells baked goods), the few clubs visited suggested that food distribution, coupled with persisting traditional attitudes and low expectations for women, encourages authoritarian and paternalistic attitudes not conducive to good development.

An alternative approach is being taken by a pilot Women's Program being developed in conjunction with PA's own technical assistance activities. Still in a preliminary stage, it is being developed with seed money from UNICEF. The program has four major components: empowerment (with emphasis on problem-solving), parent education, health (including family planning), and employment with income. Innovative aspects of this project include its collaboration with the participants themselves on program content, its focus on women as individuals and economic actors rather than

exclusively as mothers, and its goal of self-sufficiency and eventual freedom from dependence on donated foods. Over the next six months this pilot project will be developed and tested in 20 urban mothers' clubs (divided equally between El Alto and La Paz). The program will then be evaluated to assess its impact on participating women and their children, as well as to determine the feasibility of replicating it in other clubs. The innovative methodology, expertise and unusual dedication of project staff may turn this effort into a promising new departure for mothers clubs in Bolivia.

This pilot project may provide an important demonstration for both ADRA and CARITAS. Visits to their clubs revealed a pre-determined curriculum, with little evidence of beneficiary participation in design. Although both organizations speak favorably of participatory project design and interactive education, site visits presented dismaying passivity, though this may have been due in part to the presence of outsiders. As an example of the merits of participation, interviews at one of the Pilot Project clubs identified a strong felt need for learning how to count change. This, in conjunction with similar economic concerns, offers the possibility of a curriculum that would continue to attract mothers, even without commodities.

Consideration of felt needs also showed wide concern for family planning. Without seeking to impose on Cooperating Sponsors, USAID may wish to seek parallel methods for linking private family planning efforts in Bolivia with club members.

Difficult trade-offs are involved in deciding which clubs to work with, for those with the neediest members also require the most intensive assistance in order to benefit from training and other development activities. The targetting of clubs should be left up to each participating agency. However, in assessing those programs (with or without Title II commodities) that involve the most disadvantaged women, adequate time should be allowed before deciding whether or not to continue the program based on degree of development impact. At this stage, the women's program will benefit substantially if diverse models are developed and tested for different segments of the population.

This situation cries out for a seminar, sponsored by USAID or others, at which PVOs and donors would design and seek agreement on the elements of promising project models. Participants would understand that they are to identify development projects, in which food could play a temporary role as incentive or source of capital. All would understand that failure to emerge with promising concept papers will mean immediate phasing down, and out, of commodity distribution in the clubs. Such a seminar should also include individual club members, representatives from CIDEM, other women's organizations, and additional women able to voice felt needs of the club universe. Donors will benefit from hearing the women's

views. The women's presence will also permit discussion of options for using beneficiary contributions. PA involvement in such a seminar should flow from review of its priorities and time constraints, as well as the politics of the situation.

#### E. The Vitamin A Amendment

This Evaluation did not include assessment of the Grant amendment that directed Planning Assistance to assist integration of Vitamin A programs into current PVO health activities. Even if it had, the amendment is so recent that extensive evaluation would not have been very helpful. The Scope of Work included "Examination" of Planning Assistance support of Vitamin A Programs.

That examination revealed a fair amount of initial haste in arranging the amendment and in the making of sub-grants by Planning Assistance, apparently because taking advantage of unanticipated revenues required rapid USAID action and PA response. The first two sub-grants fared badly, but Planning Assistance, charged with allocating remaining funds, has proceeded expeditiously and now seems clear and comfortable with its role. Because a September 1989 memo from PA to USAID indicated that none of the three Cooperating Sponsors was considered ready to share in the Vitamin A Grant, implementing it did not contribute initially to purposes of the original Grant to Planning Assistance. Current participation by some dioceses contributes to Grant purposes, but may spread the agencies even more thinly. If Cooperating Sponsors attend the Vitamin A seminars, it can easily add to their already overextended commitments. The other PVOs involved will benefit, but are not Cooperating Sponsors.

USAID and Planning Assistance should review immediately the implications, for the management assistance grant, of PA's role in supporting vitamin A programs and acting as a conduit for funds. Examination of the March 8 minutes of the Project Review Board (Junta Calificadora) reveals a Planning Assistance role that is likely to damage its reputation and relationships with Cooperating Sponsors. An interview at Save the Children, briefly a recipient of PA help, illuminated the risks. The Director affirmed his respect for Planning Assistance, but complained of being asked to prepare a proposal for a \$100,000 project, and then being asked to reduce it. Three revisions later, he is now likely to receive only \$20,000 and is understandably disturbed. It would be far better to remove Planning Assistance from the review process and limit it to helping PVOs prepare proposals. As providers of management assistance services, PA reviewers can easily become so concerned about details of project design that project approvals are delayed. Even if they are not, the identification with USAID confirms PVO perceptions that PA is a USAID adjunct. If taking away the project review role is not feasible, Planning Assistance and USAID should explore ways to

control damages. For example, PA could delegate others, not members of the management assistance group, to represent it in project review. Having someone else review the projects, while PA continues to assist preparation, will strengthen the management assistance group's consulting relationships. Nothing pleases a client more than help that produces funding.

In other respects, the Vitamin A amendment complements well PA's technical work in health and agriculture. Plans for a Vitamin A Seminar that began on March 26, and review of another held in February, show good technical competence and will help PA integrate health with food distribution, a purpose of the original Grant. The nutrition expert hired under the amendment exhibits the same high level of competence shown by others in the PA group. She has been integrated well and the seminars are team efforts.

It is too early to assess probability of measurable impact from the amendment, but quality of the PA assistance and the positive responses of some PVOs support cautious optimism.

## V. THE FUTURE

### A. The Future Role of Planning Assistance

During the next 18 months, Planning Assistance will probably provide only modest on-call help to FHI, except possibly in monitoring and evaluation. This more mature, better-staffed PVO seeks little help and correctly sees itself as self-sufficient. FHI acknowledges PA's substantial contribution to this happy state.

ADRA and CARITAS offer more difficult challenges. The personnel and policy constraints affecting both agencies limit sharply the progress toward achievement of Grant purposes. Outcomes of the first 18 months and current attitudes to PA help suggest, however, that both can reach levels of managerial and developmental competence acceptable to USAID, by the end of the PA Grant. This prediction assumes that acceptance is not based on an impossible ideal, but on some reasonable or average standard. USAID and PA should agree on details of acceptable client performance, to guide future management assistance.

The likely end-of-Project outcomes will leave Planning Assistance frustrated, but that is frequently the consultant's lot. To continue pursuit of some management ideal beyond the next 18 months, will be an inefficient use of USAID money and Planning Assistance time.

The very useful role carved out by Planning Assistance, that goes far beyond the initial Grant description, justifies extension of the Grant -- but for different purposes. The Cooperating

Sponsors will need help in monitoring and evaluation, for example, long after June, 1991. Though they become self-sufficient at a reasonable level, there will remain many special problems of implementation and project design, where PA can help. PA's useful role as mediator, between Cooperating Sponsors and municipal agencies, for example, also serves useful purposes. PA's management help to small PVOs, under the Vitamin A Grant, has been well-received and, depending on continued success, may merit extension and expansion.

Perhaps most important, assuming it can develop a more appropriate helping relationship with the Sponsors, and be perceived as their advocate, Planning Assistance can save the Food for Peace Office much time and anguish by serving as the PVOs' intermediary to USAID. Though the U.S. Government may continue to pay PA, as it also supports the Sponsors, the intermediary role can work if PA modifies present attitudes and practices. Planning Assistance need serve only one master, even though the other pays, but this requires various changes in relationships among USAID, the PVOs and the management assistance group.

#### 1. Institutionalizing Better Management and Development

Achieving the impressive outcomes predicted here assumes that 'USAID will stop overloading the system and Planning Assistance. Indeed, any reduction or simplification of reporting and other burdens will improve the probability of success. USAID should use PA only for tasks consistent with the helping relationship of the Grant, and recognize that the PVOs already have their hands full in trying to implement the major policy change to development. Furthermore, achieving Project purposes calls for Planning Assistance to remain a consultant and resist all temptations to impose change on the PVOs. ADRA and CARITAS are clients, with independent priorities and views in some areas that may never change. Their responses to PA indicate willingness to modify many practices, provided their autonomy is not threatened. Planning Assistance can convey bad news from USAID, if it does so sympathetically. It can record dissent, when PVO decisions threaten disaster, but it will have to let the agency suffer the consequences of error. Unless ADRA and CARITAS view PA as their consultant, instead of as another PVO with an agenda of its own or as a proxy for AID, Grant purposes will not be served well.

These recommendations should not be viewed as "coddling" PVOs. The evaluators understand well that dealing with Cooperating Sponsors is no bed of roses. Nevertheless, the very desirable relationship of "efficient partners" cannot be achieved, unless the PVOs are treated as such. Assuming that satisfactory helping relationships can be established, the next 18 months offer opportunity to consolidate and institutionalize initial achievements. ADRA and CARITAS, their capacity to absorb more knowledge already taxed, need help in applying what they have

learned. Planning Assistance staff should spend more time helping trainers within the PVOs to strengthen application throughout their agencies. PA should now become more reactive, responding to the Cooperating Sponsors' felt needs and calls for help. Dissemination and reinforcement of PA manuals merits priority attention.

A few other specific changes in priorities appear useful. Planning Assistance acknowledges need for intermittent help of public health consultants, to aid its work. It is less clear, however, that PA should be offering such help to the clients, as contemplated in the Grant. Credibility in health has suffered because of two false starts, physicians who lasted only a few months. Furthermore, the Sponsors express little need for health consultations and seem to have other access to whatever they need. Health purposes of the Grant will still be well-served by the Project.

## 2. Institutionalizing Staff Development

Planning Assistance cannot, in ten years, singlehandedly turn CARITAS and ADRA into self-sufficient development organizations. Achieving that desirable result requires creating within the PVOs themselves, the capacity to disseminate and reinforce the attitudes and skills introduced through PA seminars and consultations to date. Unless the agencies can themselves initiate new staff into the wonderful worlds of development and management, employee attrition will soon dissipate the effects of PA work. Though emphasis on institutionalizing attitudes and practices during the next 18 months will help, permanent agency improvement implies internal capacity to continue the process begun with PA collaboration. Giving priority to helping training offices, and other individuals identified as critical to maintaining gains, flows logically from recognition of the indispensable multiplier effects essential for achieving Project purposes. With 16 CARITAS diocesan offices, for example, Planning Assistance cannot do the job alone.

The Director of FHI identified what he called "spontaneous replication" of changes initiated by Planning Assistance. He acknowledged that, far from being spontaneous, institutionalization had resulted from the efforts and example of those trained initially. Focusing PA attention on senior employees, as in FHI's approach, has proved to be a successful strategy for achieving Project purposes.

It is clear that agency training offices must become competent intra-agency authorities on development and management, or their well-intentioned but misguided efforts will soon nullify PA impact. Occasional Planning Assistance refresher workshops, or seminars on more sophisticated new concepts, may remain appropriate (e.g.) even in 1995. To be useful, however, CARITAS and ADRA need permanent internal capacity to absorb and disseminate what is being

presented.

### 3. Financing Self-Sufficiency

Another major change, here recommended for focus of PA management assistance, stems from consideration of the self-sufficiency goal. An organization can be self-sufficient or self-sustaining at any stated level, however well-managed in other respects, only if management can generate the resources needed to maintain the desired level of operations. This widely-acknowledged principle applies strongly to PA work with ADRA and CARITAS.

Both Sponsors clearly wish to maintain their current level of operations, and fear the shift to development only because it threatens that desire. To avoid reduction, and become more than dependencies of AID, they need help in finding new sources of funds, and in learning how to tap them. Their identification with food distribution hampers the search, but can be overcome.

Building on many of the skills they have already transmitted, Planning Assistance can concentrate in the next 18 months on building client capacity to seek and find support outside the Title II Program and outside AID. However, identifying sources and implementing a fund-raising strategy must accompany improved program planning, if projects are to materialize. For example, their food-driven history makes clear that ADRA and CARITAS need help in distinguishing between a) building a sensible and fundable development strategy, and b) continuing a "chase the money" strategy driven by resource availability. They would also benefit from learning to tailor proposals to donor concerns, without sacrificing their own goals. Planning Assistance can also help them assess donor response, so that proposal-writing time is not wasted. Getting a donor to "buy into" an initial concept, before an applicant spends too much time on an uninformed proposal, is another useful skill that PA could share with Sponsors.

Planning Assistance needs to institutionalize, within each FVO, the capacity to become a financially independent non-profit organization, with a broad funding base. ADRA and CARITAS both say, in effect: "If you want development in your Title II Program, give us the money or show us how to get it." They view their response far more positively than what they perceive to be that of USAID and PA: "We'll give you the money, but only for a smaller program."

The Food for Peace and PA preferences for less diverse, more concentrated activities is perfectly consistent with the shift to the fund-raising assistance here proposed. The results desired are more likely to be achieved with the carrot of "we'll help you grow into your present program and become a development organization," than with the stick of "do development or we'll cut you." Paradoxically, having to accommodate to new funding sources may force the FVOs into the very organizational models preferred by

USAID and PA. More important, the emphasis on fund-raising offers the possibility of making Title II commodities useful support for development programs, instead of having development be a sometimes-unwelcome imposition on food-driven agencies.

Planning Assistance, USAID and Sponsor staff need to recognize, as the Director of CARITAS insisted, that non-USAID donors have little interest in making Title II food distribution, and the related U.S. image, look good. Any approach to most must propose a development project, with little or no mention of food. Once the development concept has been accepted, more detailed planning may identify a promising incidental and temporary role for commodity distribution.

#### B. The Future With ADRA

It is almost impossible to be a "hatchet person" and a consultant in the same agency. To Planning Assistance's credit, they have almost succeeded in being both at ADRA. Brought in by USAID to make ADRA "developmental" and "well-managed," PA correctly perceived the Food for Peace Office message as "cut, if necessary." ADRA was wise to the ways of USAID and also concerned about protecting the food resources that assured its survival. It immediately and rightly saw Planning Assistance as a threat to maintaining current project and food distribution levels. An unfortunate financial situation, identified during routine diagnostic analysis, but followed by some intemperate PA correspondence, confirmed ADRA misapprehensions.

To its credit, ADRA nevertheless made good use of PA consulting help. Though ADRA's initial lack of enthusiasm may have been inevitable, interviews indicated that ADRA has come a long way toward accepting PA help as an answer to felt needs, and not merely out of deference to USAID. The PVO is now clearly more interested and competent in management and development than before the PA Grant.

To build on this promising base, Planning Assistance first needs to minimize direct contacts between Charles Patterson and senior ADRA staff. Though Patterson's messages seem to have been generally accurate, his chosen medium of harsh letters has diminished his value as a consultant to ADRA. In addition, Project Manager Jaime Medrano should review all PA correspondence to ADRA before mailing. If he cannot stop the inappropriate, he can at least tone it down or apologize beforehand.

To reduce the threat correctly perceived by this PVO, Planning Assistance must become ADRA's consultant. This means telling ADRA, and USAID, that PA accepts ADRA for what it is, including its goals and priorities, and seeks only to help achieve them. Since development and management concerns now permeate ADRA goal setting and programming, becoming ADRA's consultant, instead

of USAID's bearer of ill tidings, will not distort the PA task. ADRA knows that USAID requirements must be met, but resents a consulting group perceived as giving highest priority to meeting them. ADRA clearly does not wish to be food-driven, but must remain so until it is assured of enough resources, from Title II monetization and other funders, to make development impact its guiding principle. Rebuilding the helping relationship should be Planning Assistance's main concern. The continued presence of Brian Soto, an unusually effective ADRA intern and staff member, as a recently hired FA consultant, can accelerate the process.

Applying the institutionalization strategy recommended in this Report, Planning Assistance should continue follow-up of practices and procedures already introduced, along with presenting and reinforcing use of manuals. ADRA manuals, prepared with PA help, will become key parts of the agency's management system, if institutionalized through appropriate reinforcement and follow-up. Work plans should be prepared jointly, as always, and Planning Assistance should also explore, with ADRA, possibilities for integrating any help available from ADRA International into the institutionalization strategy.

In consultation with ADRA, Planning Assistance should also identify those offices and individuals, within the PVO, with greatest potential for assisting and continuing the move toward self-sufficiency already begun with Planning Assistance help. ADRA's La Paz Regional Director understood immediately the importance of building internal staff training capacity. He also acknowledged that doing so presents difficult recruiting and other problems. Nevertheless, if PA and ADRA can develop ADRA capacity to maintain management improvement and other gains, ADRA can be expected to a) meet reasonable USAID standards for developmental and managerial adequacy, and b) maintain and improve development planning and management, by the end of the Grant.

The strategy for self-sufficiency also requires that PA give high priority to helping ADRA find new sources of funds. The Director of ADRA expressed interest in receiving this kind of help. While most of the consulting will involve assisting in project preparation, other aspects of fund-raising strategy and tactics require attention. For example, coordination with ADRA International, the Organization that assists national ADRA programs, will encourage mobilization of substantial development resources. ADRA International has an April meeting in Lima, that several ADRA Bolivians will attend. With better collaboration, PA consultants can integrate and reinforce lessons transmitted there.

Helping ADRA find funding will allow PA to show ADRA that donors, too, want better-focused, less diverse activities. PA can also help ADRA recognize that the current employment ceiling, said to be 105 persons, can only support adequately a smaller, more concentrated program level. Donors will soon let ADRA know that

PARTIAL LIST OF PERSONS INTERVIEWED

Planning Assistance- The evaluators interviewed the staff of  
Planning Assistance in Bolivia

Planning Assistance- Bob Learmonth            Acting Director  
(Washington Office) Sean Bradley            Financial Officer  
Peter Bachrach            Program Officer

Planning Assistance Lynn Patterson  
(Pilot Project) Carmen Velasco  
Deborah Llewelyn  
teachers, assistants

USAID/Bolivia- Robert Kramer            Deputy Director  
Sal Pinzino            Director, Food for Peace  
Office  
Luis Fernando Moreno            Food for Peace  
Officer  
Charles Llewellyn            Health Officer

ADRA/Bolivia Lamar Phillips            Director  
J.C. Bentancor            Vice Director  
E. Marim            Vice Director, Finance  
Rane Lizon            Director, Madre/Nino Program  
Brian Soto            Assistant to Director

ADRA/La Paz Heber Michel            Director  
Carlos Aramayo            Engineer  
Dr. Panyagua            physician  
nurse

CARITAS Jose Barrientos U.            President  
(National Office) Oscar Borda            Executive Director  
Jose Murguia            Engineer  
Oscar Michel            Architect  
Lilia Rojas            Planning Officer

CARITAS( La Paz) Eulogia Tapia            Social Worker

CARITAS (Oruro) L. Aguirre L.            Director

Catholic Relief Barbara Myers            Director  
Services  
Christine Tucker            Sub-Regional Director  
John Conroy            Logistics Officer  
Dieter Wittkowski            Program Officer

CIDEM Ximena Machicao            Vice Director

FHI	Randall Hoag Olga De Oliva F. Rodriguez Adhemar Pinaya	Director Head of Madre-Nino Project National Financial Manager National Title II Manager
Municipality of La Paz	Fernando Soliz Rosario Ramiro Rolando Lenz	Director, Accion Comunal Social Worker Director, GTZ Reforestation Project
Netherlands Aid	Jan Bartlema Jan Bultos	Sub-Director Director, Dutch Aid Agency
Save The Children (Bolivia Office)	David Rogers	Director
Julio Frudencio, Linda Farley, Oscar Sunuga,	Agriculture and Food Aid Consultant Food Aid Consultant President-Community Committee, LLojeta, La Paz	

Visits to Project Sites:

1. Staff, promoters, FFW beneficiaries-CARITAS/Oruro
2. Mujeres Bolivianos, El Alto -- Planning Assistance Pilot Project
3. Staff, promoters, beneficiaries: La Portada, CARITAS/LaPaz
4. Staff, President, beneficiaries: Ciudad Satellite, CARITAS/LaPaz
5. Staff, beneficiaries: Villa Hermosa, ADRA/La Paz
6. Staff, President, promoters, beneficiaries: El Alto, ADRA/LaPaz
7. Promoters, community members: Cohoni, ADRA/LaPaz region
8. Promoters: Quilihuaya, ADRA/LaPaz region

serious development work, with the same dollar volume of program, requires more staff. This approach allows others to let ADRA know its deficiencies, leaving Planning Assistance to be the friendly consultant that helps the agency correct those deficiencies.

The institutionalization approach, implemented by Planning Assistance as ADRA's consultant, requires PA to dissociate itself from USAID review processes. The consultant must seek to be perceived as the PVO's ombudsman. If the consulting help is perceived primarily as "to keep USAID happy," its impact will diminish greatly. Furthermore, PA must recognize that reduction of ADRA's clearly unmanageable diversity can come only from the PVO itself. Heavy-handedness, whether from USAID or PA, only nullifies PA's very useful consulting work.

### C. The Future With CARITAS

Planning Assistance needs to improve CARITAS' perception of it. The Cooperating Sponsor, and CRS as well, see PA as an extension of USAID and not as their consultant. CRS also complains of poor coordination by PA, and sees PA as pursuing its own agenda -- when not following that of USAID. For example, CRS spent \$20,000 to help CARITAS develop information systems in Zones 1 and 2, only to discover later that Planning Assistance sent a consultant to do the same thing in Zone 3. Although Planning Assistance points out that CRS participated in the impressive decentralization of CARITAS planning and in other work, it agrees that coordination could be much better. At this time, PA has not only lost an important ally, but has created resentment and confusion. A CRS perception that USAID and PA favor ADRA, based on comparisons between program sizes and allocation of management assistance, aggravates the problem. Planning Assistance agrees that, during the next 18 months, help to CARITAS should be at least twice that of ADRA. To date ADRA has received more help than CARITAS.

Accepting the high priority for the training of trainers recommended in this Report, it is clear that management development within CARITAS must become a joint effort of CRS and Planning Assistance. CRS seeks primarily to a) make CARITAS more developmental, and b) prepare it to be an independent Cooperating Sponsor. Both goals are complementary, where not identical to, PA's own mandate. With AID funds, CRS financed additional staff for the CARITAS national planning office, and also established four new regional technical support offices. These are logical vehicles for institutionalizing better development and management in the dioceses, but there exists no tri-partite agreement (CRS, CARITAS, PA) for doing so.

The Catholic Bishops, ultimate authority in CARITAS, recently accepted a 20% reduction in PL480 commodities in exchange for a comparable increase in monetization proceeds. It is not yet clear

whether CARITAS will have to present development proposals. Neither CARITAS nor CRS exhibit strong attachment to food distribution, especially in mothers' clubs, but share ADRA's concern about reducing distributions before being assured of operating funds from elsewhere. It is not yet clear that comparable monetization provides adequate replacement for beneficiary contributions and other revenues. If not, CARITAS needs a broader funding base. As a development organization not driven by commodities, CARITAS would be unlikely to distribute commodities except during emergencies. Their problem, shared by CRS, is how to finance the transition. The important role that CARITAS' network and experience could play in future food emergencies should be considered by USAID, before allowing it to be dismantled.

A visit to the Oruro Office of CARITAS confirmed that the line between regular and emergency distribution blurs easily. Well-targetted food distribution, with or without development, is rarely misplaced. CARITAS/Oruro understands well how to use commodities as temporary incentive, but emphasizes, correctly, that semi-permanent food support, accompanied by development activity, may be indispensable for the most needy.

The Oruro visit also confirmed the developmental possibilities of a good CARITAS Office. Interviews with a University of Oruro agronomist and others support a finding that the Office plays a key role as catalyst and coordinator, mobilizing resources, technical help and equipment from various sources, and combining them into often-effective development efforts. Title II commodities yield good multiplier effects and, if viewed as complementary to a development-driven program, can help CARITAS, in Oruro and elsewhere, become a self-sufficient development organization.

The self-sufficiency strategy proposed in this Report favors a combined CARITAS-CRS-PA effort both to find more funds for CARITAS, and to build adequate staff training and fund-raising capacity within the PVO. If Planning Assistance can improve the consulting relationship, and cooperate more effectively with CRS, there is a promising basis for assuming that, in 18 months, CARITAS will be ready for independent Cooperating Sponsorship. At the very least, the PVO will be competent to go it alone, with perhaps a little intermittent help from CRS.

#### D. The Future of Title II in Bolivia

Review of a) the current Title II Program in Bolivia, b) the USAID desire to convert it into a well-managed development effort, c) the attitudes and skills of ADRA and CARITAS, and d) the availability of USAID and other funding, suggests two principal options.

Because USAID still needs the Cooperating Sponsors, and CARITAS and ADRA still need the commodities in order to survive, some accommodation seems inevitable. USAID can bulldoze the two PVOs into accepting much lower levels of development-oriented food distribution, with complementary costs financed principally from monetization. With this model, the newly-developmental Program will still be commodity-driven. The two agencies will remain dependent on AID; phasing out of Title II, if it ever occurs, will be traumatic and resisted.

A more positive and developmental approach would help the two Cooperating Sponsors become development organizations by encouraging and assisting them to prepare and finance development projects that may, or may not, use food as part of much broader efforts. This implies gradual reduction of commodity distribution, at a rate consistent with PVO success in replacing the income from current Title II distributions through monetization and other funding. The Catholic Bishops' willingness to reduce beneficiary numbers, if equivalent monetization accompanies it, reflects a clear willingness to be developmental as long as commodity income can be replaced. Although ADRA's position is less clear, it too seems willing to reduce non-developmental distributions if it can be assured of enough replacement funding from other sources.

The two PVO's prefer not to be food-driven, but need help in making the transition. To make them development organizations, USAID must view Title II as a development program that happens to use food. The appropriate balance between commodity distribution and monetization, other than that for purchase of local commodities, depends on the kinds of development projects the PVO's come up with. CARE has now become a major development organization in Bolivia, with AID help and without commodities. Since ADRA and CARITAS will undoubtedly continue some distribution, their development funding gaps are small and both can easily come to resemble CARE, though at more modest levels.

Increased monetization for non-food development projects will not alone replace the income that PVOs now receive from distributing an equivalent value of commodities. The absence of beneficiary contributions, and the higher costs per beneficiary in the new projects, suggest that funds other than monetization proceeds, and perhaps from outside the USAID, will be required to maintain Coordinating Sponsor development program and staff levels.

It follows that the best way to make the PVOs developmental and self-sustaining is to help them replace lost income by using monetization and finding other sources. The Planning Assistance Grant can accelerate this process, by providing help in identifying and responding to new funding agencies. Obtaining more development funds, and using food only as developmentally appropriate, will diminish PVO dependence on commodities. If Title II continues, ADRA

and CARITAS will use it. If it ends, their new development posture will enable them to survive without it.

To initiate the transition process, the Food for Peace Office should let ADRA and CARITAS know immediately that distribution to mothers' clubs will be gone within e.g. three years, starting with the 20% first-year CARITAS reduction already programmed, and accompanying it with a 35% reduction in the number of ADRA centers distributing commodities. Later years of the transition can be eased by putting Cooperating Sponsors on notice now, so that they can begin identifying and using food as a temporary incentive. USAID may wish to verify, after a reasonable time, that mothers' clubs understand the phase-out schedule.

The enticing vision of self-sufficient development organizations will not be achieved easily. It implies higher tolerance for discomfort than PA and USAID have so far shown. Initial PVO development proposals, and project management, may be less than what is desired. Continuation of activities not deemed developmentally adequate may be justified as a cost of keeping the CARITAS and ADRA distribution networks available and on call for inevitable future emergencies in Bolivia.

. The proposed approach will do far more to make ADRA and CARITAS better managed and committed to development, than efforts to impose program reductions without considering Cooperating Sponsor needs that exist because of earlier Title II history. When ADRA and CARITAS come to believe that USAID and Planning Assistance are not "out to get them," their responses to pressures for (e.g.) reduced diversity and clearer thinking are likely to improve dramatically.

The suggested approach also implies coordinated planning of food distribution, monetization and Sponsor access to other funds. The future of Title II, and the balance between distribution and monetization, depends on PVO success in filling the "development funding gap" that will exist unless USAID is prepared to pay the full costs of development expenditures complementary to a slowly declining level of distribution. As USAID and Planning Assistance help increases Cooperating Sponsor access to new development funds, most PVO grievances should disappear. Perhaps most important, USAID will have added new flexibility to the Title II Program and, at the same time, fulfilled a moral and political commitment to worthy institutions it helped for many years and, for good reasons, no longer chooses to maintain.

The likely future pattern of Title II programs in Bolivia will emphasize developmental Food for Work projects and include little distribution through mothers' clubs. The balance between distribution and monetization will depend on USAID priorities, PVO preferences for food-assisted and other development activities, and their success in finding other sources for financing them.

## E. Conclusion

Planning Assistance has done a remarkable job, and made outstanding progress toward achievement of Project purposes, while trying to serve two masters. With more attention to establishing helping relationships and a more collaborative style, accompanied by some distancing from the master with money, achievements during the next 18 months will be greater. By using the new style to a) build internal Cooperating Sponsor staff development capacity, and b) helping Sponsors acquire fund-raising skills for financing development projects, Planning Assistance will help the PVOs meet the needs of USAID and become independent development organizations.

## VI. RECOMMENDATIONS

Improved achievement of Grant purposes and goals depends on responses by both Planning Assistance and USAID. Most of all, it depends on ADRA and CARITAS, but recommendations to them can have little effect. The PVOs will change only when management assistance is perceived as servicing them, a relationship that must be based on mutual trust and confidence. A collaborative relationship, aimed at helping them to maintain current program levels, with or without food, will provide the best incentive for meeting USAID needs.

### FOR PLANNING ASSISTANCE

#### A. Toward a More Collaborative Style

1. Although itself a USAID grantee, Planning Assistance should view recipients of its management assistance as clients in a relationship that is intended primarily to serve them, and avoid actions that appear to suggest lack of sympathy for, or acceptance of, client goals.

2. Planning Assistance should avoid actions that favor, or give the impression of favoring, USAID interests over those of the Cooperating Sponsors.

3. Planning Assistance should continue to provide technical and management help to applicants for grants, but should withdraw from any role in allocating funds from USAID or other sources. If this is not possible, staff involved in helping clients should be distanced, as much as possible, from reviewers. The management assistance team should engage only in those activities that are clearly consistent with being perceived as representatives of the Cooperating Sponsors.

4. Planning Assistance should be less directive and more

reactive, seeking to respond to felt needs of clients. As client perceptions become more favorable, attempts to influence their assessment of needs, and setting of goals, can become more forceful.

5. When faced with irreconcilable differences with a client, after modest efforts to influence the client, Planning Assistance should accept the client's position, recording disagreement, and the reasons for it, by a friendly communication.

#### B. Toward Client Self-Sufficiency

6. The meaning of self-sufficiency should be clarified, to include a) internalized capacity to maintain and improve new practices; b) internalized capacity to identify and secure resources from new donors, consistent with client development strategy; c) identification of specific program levels at which self-sufficiency will be achieved; and d) identification of objective criteria for assessing client attainment of the minimum technical and managerial proficiency necessary for the desired program level.

7. Future Planning Assistance help should focus on strengthening the internal capacity of ADRA and CARITAS to disseminate and reinforce changes initiated through PA seminars and other work.

8. Future assistance should give high priority to helping each Cooperating Sponsor a) calculate its "development funding gap"; b) obtain funds to meet it; and c) develop the capacity to continue generating development support independently.

9. Planning Assistance should encourage independent preparation of documents by clients, to stimulate self-sufficiency and identify weaknesses. PA should then follow up with sympathetic and supportive assistance to correct deficiencies.

10. Planning Assistance should join Catholic Relief Services in developing a plan, in cooperation with CARITAS, for qualifying CARITAS to be a Cooperating Sponsor by the end of the Grant period. It should also collaborate with ADRA International in planning self-sufficiency for ADRA/Bolivia.

#### C. Management and Technical Services

11. Planning Assistance should abandon efforts to provide direct technical assistance in health to Cooperating Sponsors, since it lacks comparative advantage, and limit use of health consultants to assuring the continued high technical quality of PA management help.

12. Planning Assistance should reallocate provision of

management and technical services, to assure that CARIYAS receives at least twice as much help as ADRA during the project's remaining months.

13. Planning Assistance should array and compare alternatives for making mothers clubs more developmental, with or without commodity distribution. After identification of preferred alternatives, technical assistance from PA may be useful for institutionalizing the new models.

14. Planning Assistance should take USAID's best estimate of likely FY 90 and FY91 Title II monetization, compare expected proceeds with client development needs at current program levels, and identify a "development funding gap" for each Sponsor.

15. Planning Assistance should be sure that clients understand the limited relevance of attractive graphic presentations for development planning, while emphasizing their advantages for attracting donors.

#### FOR USAID

##### A. Making Planning Assistance More Effective

1. USAID should distance itself from Planning Assistance, and encourage the assistance group to view itself as representing the Cooperating Sponsors.

2. While continuing to use Planning Assistance as an intermediary for non-threatening communication with PVOs, USAID should only request new PA activities consistent with a collaborative relationship between Planning Assistance and Sponsors.

##### B. Toward Self-Sufficiency

3. USAID should distinguish between making food distribution more developmental, which serves AID's own needs, and helping Cooperating Sponsors to become development organizations, which serves their needs.

4. Once a desired level of food distribution has been identified by USAID, it should help Cooperating Sponsors calculate the development funds needed to a) make all distribution developmental, and b) maintain current program levels by additional non-food developmental activities.

5. After reviewing monetization plans and limits, USAID should encourage each Cooperating Sponsor to use Planning Assistance to help it identify and meet the development funding gap.

##### C. Programming

6. USAID should assist in organizing, though not necessarily in funding, a workshop on development planning for mothers clubs, with minimal reference to commodity distribution.

7. USAID should consider renewing the Planning Assistance Grant, but only for activities in relation to purposes that go beyond those presently being addressed. These activities may include, for example, technical assistance on design and implementation of preferred models for more developmental mothers clubs, and continued technical assistance on evaluation and on the design and implementation of Vitamin A projects.

8. USAID should consider that the Planning Assistance Grant has produced results much more likely than if individual grants had been made to PVOs, such as a) economies of collective assistance on matters of common concern, b) availability of a convenient vehicle for communicating with Cooperating Sponsors, c) improved collaboration among PVOs, and d) better identification of PVO deficiencies and appropriate help for reducing them.

9. USAID should recognize that ADRA and CARITAS will not reach high standards of management and development in the near future. Nevertheless, AID should accept their limitations and support the two agencies, provided they reach the minimum level of proficiency necessary for "effective partnership" with USAID. That level should take into account the Sponsors' inherent limitations.

10. USAID should consider monetizing commodities that become available as mothers club distributions decline, making proceeds available specifically for developmental non-food activities with clubs that are no longer receiving food.

# APPENDIX

## DOCUMENTOS PRODUCIDOS POR PLANNING ASSISTANCE PARA USO DE LAS TRES AGENCIAS

### ARCHIVADOR No. 1 MANUALES GERENCIALES

1. PLANIFICACION MULTIANUAL (LARGO PLAZO)
2. PLANIFICACION ANUAL
3. ORGANIZACION
4. PERSONAL
5. DIRECCION Y CONTROL
6. SISTEMA COMPUTARIZADO DE CONTROL DE ALIMENTOS
7. MARCO DE DESARROLLO DE ADRA/BOLIVIA

### ARCHIVADOR No. 2 MANUALES TECNICOS

1. INFRAESTRUCTURA URBANA
2. HORTICULTURA
3. FORESTACION
4. GANADERIA
5. INTERVENCIONES PRIMARIAS DE SALUD
6. GUIAS SOBRE AGUA POTABLE Y SANEAMIENTO AMBIENTAL

### ARCHIVADOR No. 3 DOCUMENTOS TECNICOS PRODUCIDOS POR PLANNING ASSISTANCE PARA USO DE LAS TRES AGENCIAS

1. GUIA PARA ELABORACION DE PROYECTOS AGROPECUARIOS
2. GUIA PARA LA EJECUCION DE PROYECTOS RURALES CON ALIMENTOS  
POR TRABAJO
3. PROYECTO: SALA MULTI-USO, TALLER Y DEPOSITO, PLANOS, COMPU-  
TOS Y PRESUPUESTO
4. PROYECTO: VIVIENDA PARA TECNICOS Y PROMOTORES
5. GUIA PRACTICA DE COSTOS PARA PRODUCCION AGROPECUARIA
6. GUIA PRACTICA DE ARITMETICA DE CAMPO
7. GUIA PARA PROMOCION Y EXTENSION
8. PROPUESTA DE SISTEMAS DE MONITOREO Y EVALUACION.

**ARCHIVADOR No. 4  
FICHAS, FORMULARIOS, Y FORMATOS PREPARADOS PARA USO  
DE LAS TRES AGENCIAS**

- 1. FICHA COMUNAL**
- 2. GUIA PARA EL NUCLEAMIENTO DE COMUNIDADES RURALES**
- 3. ARBOL DE SOLUCIONES PARA FORESTACION**
- 4. PAUTAS DE EVALUACION PARA PROGRAMAS DE LAS  
OFICINAS REGIONALES**
- 5. PROGRAMA MONETIZACION - REGISTRO DE PROPUESTAS  
PRESENTADAS AL COMITE DE PROYECTOS**
- 6. CUADRO DE MONITOREO**
- 7. FORMULARIOS PARA OBTENER INFORMACION SOBRE  
ORGANIZACION DE UNIDADES Y DESCRIPCION DE CARGOS**
- 8. ENCUESTA APT-URBANO - SUPERVISOR**
- 9. CUESTIONARIO PARA LOS VECINOS**
- 10. ENCUESTA APT-RURAL COMUNIDAD**
- 11. ENCUESTA CENTROS DE MADRE - NINO**
- 12. FORM. PA-01 SOLICITUD DE FONDOS - PROGRAMA MONETIZACION**
- 13. FORM. PA-02 DESCARGO DE FONDOS**
- 14. FORM. PA-03 RESUMEN DE DESCARGO DE FONDOS**
- 15. ACTIVO FIJO**
- 16. RECEPCION DE MATERIALES**
- 17. KARDEX FISICO DE MATERIALES**
- 18. CUADRO COMPARATIVO DE MONETIZACIONES**
- 19. PROGRAMA - MONETIZACION - CONTROL DE ASIGNACIONES,  
INSPECCIONES Y DESCARGOS**
- 20. ESQUEMA METODOLOGICO PARA EL DESARROLLO DE  
PRODUCTOS**
- 21. NORMAS MINIMAS DE USAID/BOLIVIA PARA PROGRAMAS  
DE ALIMENTOS POR TRABAJO.**

**ARCHIVADOR N.º 5  
ADRA**

**A: PROPUESTAS Y CONVENIOS**

- 1. PROPUESTA DE ASISTENCIA GERENCIAL Y TECNICA (ac. 88-91)**
- 2. CONVENIO PLANNING ASSISTANCE CON ADRA - BOLIVIA**

**B: DOCUMENTOS PRODUCIDOS POR PLANNING ASSISTANCE  
BOLIVIA**

- 3. DIAGNOSTICO DE ADRA - BOLIVIA**
  - SITUACION DE COYUNTURA EN LA TOMA DE DESICIONES DE A.D.R.A.**
  - ESQUEMA DE FUNCIONAMIENTO DE A.D.R.A. EN LA ETAPA DE TRANSICION**
- 4. MARCO INSTITUCIONAL A.D.R.A. - BOLIVIA**
- 5. PLAN MULTIANUAL (P.O.M.A.) 1990 - 1992 DE A.D.R.A. - BOLIVIA**
- 6. MANUAL DE OPERACIONES Y FUNCIONES A.D.R.A. - BOLIVIA**
- 7. PLAN OPERATIVO 1989 - 1990 DE A.D.R.A. - LA PAZ**
- 8. PLAN OPERATIVO 1989 - 1990 DE A.D.R.A. - COCHABAMBA**
- 9. PLAN OPERATIVO 1989 - 1990 DE A.D.R.A. - TRINIDAD**
- 10. PLAN OPERATIVO 1989 - 1990 DE A.D.R.A. - RIBERALTA**
- 11. PROGRAMA PARA EL DESARROLLO DE LA MUJER Y DE DE LOS NINOS DE 0 a 6 ANOS**