

Draft REPORT, MONROVIA, LIBERIA, Wednesday September 12, 1979

IAW

PA-111-113
10/1/79

Chap. 6

Reporting and Appraisal of ProjectsBackground

When IAW first began to plan this meeting to discuss the role of regional seminars in promoting projects it also undertook an appraisal of the projects themselves, and expressed the intention of basing future strategies on the results of this appraisal.

Our purpose in discussing reporting and appraisal is to try to identify the different type of information we need to know in order to carry out this intention and ways in which IAW could collect the information in future, so that IAW can carry out this intention.

Our need for information stems from the universal, basic question - "How can we make the best possible use of the resources available to us to get the results we want?" This applies at all levels - from government donors and international organizations to the personnel running individual projects.

The problem is - how to define the results we want and decide which yardsticks we wish to use to tell us whether these results have been achieved. We shall not find a complete answer today but can discuss some aspects of the problem.

The first step has already been taken. Thanks to the collaboration of project organizers, the pre-seminar questionnaires have provided a baseline of detailed information about individual projects. Some general trends in the projects could also be detected when this information was collated.

The questionnaire information has been augmented by reports made at the seminar itself and the benefits of sharing this full and detailed knowledge about projects has become increasingly obvious in the discussion of programme development and the problems experienced in the field. This knowledge is valuable to IAW, to donor agencies and other agencies such as IPPF which are trying to promote women's development. The second step is to maintain the momentum of information-gathering which has been established. For this we need to clarify the types of information required and the reason for wanting it. We can distinguish three purposes for which information is required.

1. Management or supervisory information.
2. Appraisal - measuring the progress of the project.
3. Exchange of experience.

Management Information

Management information is needed to run the project efficiently. It covers such aspects as whether tasks are properly carried out, administrative support is adequate, expenditure fully accounted for, and what has been achieved in terms of activity and any unexpected operational problem. This information should be regular and systematic. Its primary purpose is to serve management but, in summary form, it also indicates to donors and others whether projects are being administered efficiently. Personnel working in the project must also understand the need for regular management information and have opportunities for sharing in discussions about it.

Appraisal

This is an everyday process. We continually make judgements based on our own experience about whether activities have achieved their purpose or not, and whether they were worth doing. However, when it comes to more complex activities lasting for months or years, identifying objectives and finding ways of measuring progress needs a more systematic approach.

By stating the objective clearly at the beginning, we are saying what we want to achieve, and implying that the project will be handled in such a way that the objective will be achieved as far as possible. A project may be very efficiently run, but if it ends up with the wrong result it is not a successful project. Useful work may be done which nevertheless does not satisfy the project's main objective.

A sex education and counselling project in England, designed for older teenagers, failed to reach the intended audience because younger children were allowed to join in. It met the youngsters' needs successfully but their presence inhibited teenagers from attending. Eventually a choice had to be made between turning the project into a youth club or excluding the young age group from the project. The latter course was taken, thus incidentally relieving the frustration of project volunteers who had been specially trained to work with the older group, and did not wish to go on improvising games for the young ones.

There are some problems in establishing objectives for integrated development projects because of the complexity and interdependence of the activities involved. Sometimes objectives turn out to be mutually exclusive. IPPF mobile family planning teams in Kenya held family planning clinic sessions at health centres to coincide with maternal and child health clinic sessions. Family planning education was given to mothers at the MCH clinic and acceptors could be given services immediately. But another objective of the teams, viz. to train midwives and nurses in family planning during these sessions was not met because many of the personnel they wished to train were simultaneously engaged in running the MCH sessions from which acceptors were recruited.

The project may have unintended effects which alter its objectives. An outstanding feature of the IAW projects has been the range of benefits gained by the community. Projects were collaborating in work for better communications (bridge building, cleaning roads, canals and waterways), better water supply and sanitation or raising funds for local community development. A proposed chicken farm project would supply eggs which otherwise would be imported from another country.

Leadership and training were also quoted as benefiting the community, by stimulating interest in the community centre, greater unity in the neighbourhood, better utilisation of existing health facilities and other local resources and raising the consciousness of women about their role.

Unintended effects may be good or bad but in either case should be fed into the cycle of information and used to improve projects. Several changes in IAW projects have taken place in response to particular needs - classes for under-5s, literacy and numeracy for school drop-outs - inclusion of health education, efforts to work with young people on a Community Centre Committee. A rural site was abandoned in favour of an urban site for the chicken farm project, because market demand was greater and volunteers could more easily supervise activities.

Project organizers or sponsoring agencies may have their own additional objectives. For example, it could be expected that projects sponsored by the Guide Movement would demonstrate the spirit of Guiding, and that activities would be undertaken in that spirit as part of their approach to women's development.

How do we know that the project is progressing satisfactorily?

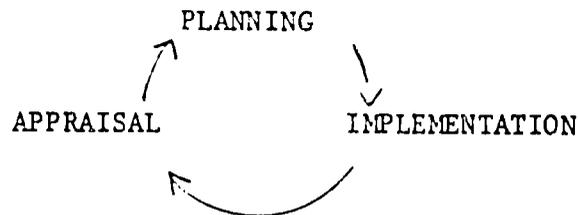
We need yardsticks for measuring progress towards the objective. These differ according to the nature of the project. For example, in a project combining family planning with other development activities, the number of women accepting family planning would probably not be an important indicator in the initial stages of a project. Establishing good relations with the community and other agencies, finding out what the community wanted from the project would be far more important for its survival.

As shown in the pre-seminar questionnaire, many simple yardsticks can be used to describe changes in knowledge and attitude among women reached by the projects; or their use of the skills that have been taught. These tell us more than "numbers reached" only.

Self-reliance or self-sufficiency is another yardstick for the long-term success of projects. This can be expressed in terms of funds generated by the project, with correspondingly less external support, or by the amount of local volunteer support gained, which will finally enable the project to run itself.

Use of Appraisal Procedures

All the above information, though interesting, will be useless unless it is acted upon. The purpose of it is to revise the project so that what is good can be emphasized and what is bad can be eliminated. The information must be fed into the cycle of planning-implementation-appraisal:



so that if necessary objectives can be modified and operational adjustments made. Some project organizers, believing that an activity is good in itself, persist in trying to make it work. A story is told of a prison governor who decided to provide therapy classes for the prisoners. After six months the therapist expressed the opinion that the classes were having no effect at all. "In that case," said the governor, "we had better double the number of classes."

Finally, the nature of the appraisal must be understood at all levels of the project. Otherwise the necessity of collecting information and perhaps making programme changes on the strength of it, will not be understood or, even worse, misunderstood, with adverse effects on the project.

Another kind of appraisal involves trying to find out what makes projects work. In describing how these objectives are carried out and all the processes involved - between individuals, between the project and the community and other agencies, we may make some very useful discoveries about the successful ingredients of a project. An example was quoted in the seminar of women who did not wish to attend literacy classes until they discovered that they needed to be able to sign their names and use numbers in an income-generating project of great importance to them. The report on the questionnaire findings quotes other problems affecting women's capacity to benefit from the project, as well as organizational problems.

Exchange of Experience

The Seminar itself has demonstrated the value of exchange of experience between project organizers. We also have other audiences for this exchange: in our own national organizations, other national and international women's development agencies and donor agencies. Decisions have to be made not only about the type of information but the frequency with which it is to be reported, who is to be responsible for the reporting procedure, and how analysis and appraisals can be fed back to the national and local level.

However the effort will be very worthwhile. By reporting your experience regularly and systematically to IAW you will be helping yourself, other projects and other organizations and so, indirectly, helping other women.

As a summary, the following six questions are suggested as a basis for finding out the information we need to know about projects.

- a. Is the need still there?
- b. Are your objectives still the same?
- c. Are the objectives being met, if not, why not?
- d. Have you discovered any unintended effects - good or bad?
- e. Are there any changes in the way the operation is being carried out?
- f. Can project expenditure be kept within budget limits and if not, what are the implications?

PLENARY DISCUSSION

Programme Information

Each project has a Board which receives some form of report from project personnel, volunteers or other officials. The following details were given by participants during discussion.

Bangladesh - monthly reports from supervisor to BFPA. Information is analysed at district and central level.

India - weekly meeting with project supervisor (a local man), full staff meeting every month to hear report and discuss it with a consultant.

- personal visits to villages
- reports from a woman CD officer in the area
- reports typed and co-ordinated.

Indonesia - supervision is limited by lack of funds to go to the remote villages. Where possible, supervisors talk to village heads about the progress of the project.

Jamaica - volunteers are in touch with Branch Presidents, who report on projects at administrative meetings. Sometimes volunteers are asked to join evaluation sessions held at the meetings.

Mauritius - weekly meetings are held with a roster of two visitors to the shop who report back. More supervisory help is required.

Nepal - volunteers record their activities on cards. Supervisor is District Chairman; workers send reports to Supervisors who pass them on to central level.

5

Sri Lanka - personal visits, involving meetings with mothers and children in the project, and presentation of written reports at monthly meetings.

Swaziland - monthly meetings are held by project personnel. Each division makes a report to a paid director who combines the reports and sends information back to the divisions.

Upper Volta - a system of monthly meetings and three-monthly meetings is followed for existing projects. Committee makes village visits.

Appraisal

It was generally agreed that setting targets would be helpful for better short-term and long term objectives. Project planning was a new concept, to be taught along with other aspects of Better Family Living, and the communities involved should also be aware of short-term objectives. Examples were given from Sri Lanka - a project designed for self-sufficiency after three years (health, sanitation, income-generating, rain storage) included manufacture of bean curd pots. Though the pots could have been sent to the town and readily sold, village people found their own markets. Money gained from onion and chillie cultivation was deposited in the People's Bank by the women concerned. Some general criteria for the success of projects could be identified from the discussion:

- gaining community participation and achieving good inter agency relationships (i.e. "survival").
- Identifying and following specific objectives.
- Numbers and types of persons reached by the project.
- Self-management and self-sufficiency.

It was pointed out from the floor that local project groups very often have their own measures of achievement but these were lost sight of in the process of reporting to agencies such as IPPF and UNFPA.

Collaboration with IPPF for reporting purposes was suggested, since a basis of systematic information already existed in the pre-Seminar questionnaire.

A plea was later made during regional group discussions for simple, flexible reporting systems which took account of the wide range of projects. In view of language problems experienced in many countries, wording should be simple.

Exchange of Experience

Regional newsletters were discussed in the Asia regional group discussion as a means of keeping each other informed, but numerous difficulties were raised such as language differences and the sheer difficulty of keeping up the newsletter. Otherwise, feedback information from IAW, using a regular reporting system, seemed at this stage to provide good potential for exchange of experience.

PROJECT APPRAISAL: OBJECTIVES AND YARDSTICKS

Within each category of project activity listed below, a number of objectives are suggested, together with yardsticks for the progress of project participants; these can be decided at the planning stage. Other objectives and yardsticks may also be adopted. These lists are intended only as examples of how specific objectives and practical measurements can be used which are directly related to the project activity and will help to show what results are being produced.

<u>Project Activity</u>	<u>Objectives</u>	<u>Yardstick</u>
Literacy and numeracy	Ability to:	
	Read a short sentence	Reads newspaper to others
	Write a short sentence	Can follow written instructions
	Recognize double numbers	
	Add single numbers	Can carry out simple book-keeping procedures
	Subtract single numbers	
	Add double numbers	
Health - Hygiene	Subtract double numbers	
	Understand need for:	
	Sanitation	Uses pit latrine
	Clean food	Boils water
Mother & Baby Care	Disease prevention	Avoids harmful remedies
	Care in pregnancy	Proper feeding of mother
	Healthy infant diet	Breastfeeding
		Supplementary & infant feeding
	Other physical needs of infant	Proper bathing & clothing
Nutrition	Child Development	Gives companionship to child Stimulation through play and teaching
	Adequate protein, vitamins	Eats meat or other first class protein
		Eats green vegetables
Better family living	Understands:	
	Spacing & limitation	Tells husband about family planning
	Contraceptive methods	Asks for supplies
	Results of too-frequent pregnancies	Practises family planning
Work Skills -agricultural		Brings friends to class Tells others
	Knows:	
	Seed selection	Increase in food crop production
	Use of fertilizer	
	New farming methods	Improved poultry farming
Animal care & feeding		
-other	Learns how to make goods	Regular output Sale of goods

RECOMMENDATIONS

RECOMMENDATION I - IAW POLICY ON WOMEN'S
DEVELOPMENT PROJECTS

From 1972 to 1979 the IAW has initiated 19 projects for women's development including better family living in third world countries. These have demonstrated that income generating activities, informal education, and self help efforts in the community can be carried out at low cost with the eventual aim of self-sufficiency and community support.

The Seminar recommends - that IAW should continue its strategy of promoting women's projects. In addition to giving continued support for countries with existing projects, it should seek opportunities to expand activities in these countries and to promote new projects elsewhere.

RECOMMENDATION II - REGIONAL SEMINARS

The seminar reviewed and appraised the four regional IAW seminars on Better Family Living held since 1972 and agreed that these meetings were instrumental in encouraging the development of projects. Learning from this experience the IAW now understands that projects are more likely to be established if some pre-seminar work can be done with the potential project organiser in her own country. This initial work involves the visit by an interested and experienced IAW member to assist the project organiser and her Association in identifying community needs and approaches to meeting those needs. Visits to the country after the seminar greatly encouraged the establishment of proposed projects. In addition, this method has also encouraged new interest and membership in IAW.

The Seminar recommends - that IAW make a regular practice of the preliminary and post-seminar visits. It recommends that a limited number of new regional seminars should be organised in poorly represented areas such as Latin America, French-speaking African countries, and Oceania. Communications with Francophone Countries should be in French.

RECOMMENDATION III - REGIONAL TRAINING WORKSHOPS

The Seminar reviewed all projects which have been funded through the IAW based on replies to the questionnaire and special reports presented to the Working Groups by seminar participants who were project organisers or co-ordinators from the national affiliates. The participants themselves described not only the achievements of the projects but also presented shortcomings and special problems in organising, planning and budgeting, programme development, operations and financial management. In the Working-Groups participants also addressed questions to those who presented their projects, and through this process of appraisal a number of areas were identified which require attention if the project objectives are to be fully achieved and the programme expanded.

RECOMMENDATION III - (continued)

The Seminar believes that one of the most effective ways to solve these problems is through regional training workshops for project co-ordinators and managers (both volunteer and paid personnel). The areas needing urgent attention are:-

- a. Planning and Project Development
- b. Budgeting and Financial Management
- c. Community Involvement
- d. Marketing (domestic and export).

The Seminar recommends - that IAW organise such workshops for all regions with five or more projects over the next two years, with the assistance of appropriate international and national agencies with experience and technical skills in these fields.

RECOMMENDATION IV - BETTER FAMILY LIVING

This review and appraisal of projects also revealed that there were many diverse approaches to the common objective of "Better Family Living". Some national bodies were limiting themselves to specific education for family planning and were providing services in conjunction with national Family Planning programme or voluntary Family Planning Associations. Others were combining this ingredient in programmes of health education, nutrition, child care, home management, vocational training for women, etc. The consensus was in favour of a comprehensive approach, including not only education in all these subjects but also income-generating projects for the women.

The Seminar recommends - that the national organisers review their Better Family Planning projects - (a) to include new elements where these are not covered by other work of their organisation or other agencies; and (b) to ensure that family planning or child spacing is included in the most practical and acceptable form in the culture in which they operate. Emphasis should be on education and on community based programmes to deliver services and supplies in ways acceptable to the people concerned.

RECOMMENDATION V - REPORTING AND APPRAISAL

IAW projects are supervised at national level through regular systems of visits by project organisers and volunteers, monthly reports and staff meetings, expert consultations and evaluation systems. Programme management information is thus already available at local level.

Owing to the nature of many projects, specific objectives and yardsticks for measuring achievement have not been identified. Nevertheless participants recognized the need for establishing priorities, avoiding conflicting objectives, identifying factors which impede the progress of projects and making the necessary modifications.

The result of the pre-seminar questionnaire and the reports given by participants during the seminar, showed that much valuable information was available which would assist in the appraisal of projects, at national level and as an overall IAW strategy. A base-line of information has been established which should be maintained on a regular basis to enable IAW and its members to assess their projects. This information should be shared throughout IAW and made available to agencies with similar aims and objectives.

RECOMMENDATION V - (continued)

The Seminar recommends - that IAW should:-

1. (a) Devise a standard project proposal form in which the aims and specific objectives of the project could be clearly stated, together with the activities by which the objectives are to be achieved;
- (b) adopt a simple annual reporting form as a basis for regular project reports;
2. Regular exchange of experience should be established by newsletters and an IAW Annual Report which would provide an analysis of the year's experience of project implementation.
3. IAW should continue to study the problem of selecting appropriate indicators for the progress of women's development projects, collaborating where possible with other agencies (notably UNFPA and IPPF) concerned with the same problem. When appropriate, information, suggestions and guidelines should be circulated to members to assist them in establishing yardsticks for their projects. Project organizers should endeavour to identify specific objectives which can be understood and followed at all levels of the project.

RECOMMENDATION VI - FINANCING

Discussions revealed that finding financial assistance is the most difficult task for all projects. In some cases the funding process takes so long that by the time the project is approved costs have increased to the extent that budgetary shortages occur right from the beginning of project implementation. In other cases, project budgets are under-estimated from the beginning because project personnel are unfamiliar with the actual cost of project components.

Considering this and taking into account the continuous increase in cost of materials and services it is evident that the need for external assistance will continue for some time.

The Seminar recommends:-

- (a) That the IAW continues to seek financial assistance from aid donors (including UNDP, UNFPA, UN Voluntary Fund for Women's Decade) to support on-going and future projects of its affiliates.
- (b) All local resources available to the community should be used to the full.
- (c) The national affiliates should employ all possible means including local and national government to obtain funds to support all or at least partial costs of projects initiated by them.
- (d) Country to country assistance should be encouraged to promote solidarity among women's organizations as well as to provide financial assistance.
- (e) The projects should continue to use the expertise and services available at both community and the national level from the government organizations as well as private sectors and NGOs.

RECOMMENDATION VII - STRENGTHENING THE IAW

In view of the unanimous sentiment for expanding the community projects of IAW affiliates, the seminar was concerned about the implications of such action for the IAW at both national and international levels. The importance of training national organizers and managers for this work has already been mentioned. In some countries, as the number and size of such projects grow, the national affiliate will have to consider whether the staff available to Headquarters is adequate to the new responsibilities.

As the seminar reviewed the recommendations made to IAW Headquarters, viz:

- (a) To organize regional seminars to expand the work in areas not now covered and to prepare such seminars by systematic visiting programmes.
- (b) To assist national organizers in the project development stage.
- (c) To organize regional training workshops for national co-ordinators and managers on planning and project development, budgeting and financial management, and community involvement.
- (d) To review and appraise the projects through a regular reporting system and to promote the sharing of experience through feedback to the projects and through visits, publications and other channels.
- (e) To seek technical assistance and supplementary funds from international sources such as United Nations agencies, and non-governmental organizations (both national and international) to support national and regional projects.

it seemed clear that the central office of IAW would require additional resources, both volunteer and professional.

The Seminar recommends - that the IAW Board approve such strengthening as a matter of urgency and recruit the necessary staff to carry out these functions.