XD-ABC-444-A
70214

Factory Workers' Center Project

Report of the Mid-Point Evaluation

Submitted to:

OEF INTERNATIONAL INC.
1815 H Street N.W., 11th Floor
Washington, D.C. 20006

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by

Simon M. Fass
P.O. Box 19254
Minneapolis, MN 55419

August 5, 1987

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Abbreviations and Acronymns

ADIH	-	Association des Industries d'Haiti
BCI	-	Banque de Credit Immobilier
CA	-	Cooperative Agreement
CARE	-	a non-governmental assistance agency
CARITAS	-	assistance agency of the Catholic church
CDRH	-	Centre de Developpement des Ressources Humaines
COHAN	-	Cooperation Haiti - Neerlandais
EPPLS	-	Enterprise Pour la Promotion de Logement Social
ETA	-	a private consulting group
FHAF	-	Fonds Haitien d'Aide a la Femme
FWC	-	Factory Workers Center
GTE	-	a factory in the assembly export sector
HAVA	-	Haitian Association of Voluntary Agencies
HDF	-	Haitian Development Foundation
IHSI	-	Institut Haitien de Statistique de d'Informatique
ICO	-	International Labor Office
INFP	-	Institut National de Formation Professionnelle
JEBSA	-	a factory in the assembly export sector
MEDA	-	Mennonite Economic Development Associates
NGO	-	non-governmental organisation
ONPEP	-	Office National pour la Participation et Education Populaire
PACT	-	Private Agencies Collaborating Together
PROFAMIL	-	a private Haitian family planning agency
SPSS	-	Statistical Package for the Social Sciences
WHO/PAHO	-	World Health/Pan American Health Organization
UNICEF	-	United Nations Children's Fund

EXECUTIVE SUMMARY

Implemented through a Cooperative Agreement (No. 521-0182-A-00-5038-00) between USAID and OEF International Inc., the purpose of this project is to establish a Factory Workers' Center (FWC) in Port-au-Prince that would initiate programs and activities focusing on improving the socioeconomic circumstances of participating workers through upgrading of their skills and their productivity as workers, on promoting a process of self-determination among the workers, and on demonstrating to participating factories that improvements in workers' circumstances can contribute to improvements in factory productivity. As will be evident in the following review of the FWC's principal components, and notwithstanding my disagreement with project staff on certain matters, at the mid-point of its progress the FWC has thus far proven an excellent undertaking.

I. Construction of an FWC Facility

Although some progress has been made in securing land upon which to construct a facility to house the FWC, as called for in the Cooperative Agreement (CA), the high cost of an appropriately-sized building, uncertainty concerning the prospects for long-term funding of the FWC, budgetary constraints, and the possibility of misunderstanding in the NGO community about project priorities (because NGOs do not usually own property) all combine to suggest that the FWC should not pursue the matter further on its own. Exploration of possibilities for joining with other NGOs to erect a shared facility appears as a more advisable approach.

II. FWC Programs

Programs envisaged in the CA included a Core (or Human Resources) course, micro-enterprise training and assistance, a housing component, health education and services, vocational training, and development of training and related materials for all the above. Priorities among these programs rearranged themselves during implementation, with staff now placing principal emphasis on participatory training and on encouraging other organisations to provide non-training services to factory workers. Progress in some programs is ahead of progress in others, but by and large they are moving along well.

a. Core Course

This course is the central focus of the whole project. Through a process of participatory exchange among workers, the purpose of the course is to heighten worker's self-respect; to expand the range of life areas over which they can claim some degree of self-determination; and to highlight areas where cooperation among workers can prove more helpful than individual

action or competition. Nebulous as such an agenda might appear to outside observers, or even to participating workers, results have been encouraging. For example, of the 60 workers who registered for the three course offerings to date, 50 stayed with the courses for the six weeks required for graduation. This willingness of workers to participate regularly after long days of work suggests that they value the course. At the same time, staff efforts to refine each offering on the basis of lessons learned in the previous one has made it possible for the most recent course to accomplish in three weeks what took six weeks in the first one. But beyond and more important than this show of interest and demonstration of increasing efficiency, evidence highlighted in Annex 4 suggests that the course can indeed engender some positive impacts. All that is required with regard to this course is continuation of staff efforts to further refine it, and initiation of efforts to document experiences, lessons learned, and impacts in systematic fashion.

b. Micro-Enterprise

The purpose of this course, now in progress with 18 participants, is to provide workers with knowledge that can help them decide whether a business or investment idea is sound. The premise behind this offering is that some workers may find micro-enterprise useful as means of supplementing their own factory wages, of helping unemployed family members secure a source of income, and of assuring some flow of income if they are dismissed from their jobs. Although both staff and participants seem enthusiastic about the course, I voiced several reservations about it that had less to do with the specifics of the course than with the whole notion of training for micro-enterprise. As in projects I have visited in other countries, including the U.S., staff responsible for teaching the course lack personal business experience, and the OEF materials they rely upon do not do justice to the dynamic complexity of the subject. The course is therefore not realistic or accurate. Also, and this tends to be normal when a course is offered for the first time, many participants (none of whom have prior exposure to business) seem to believe that course completion will facilitate access to loans. It will not. Nor will it facilitate their leaving factory work - an aspiration that most of them seem to share. The situation, as I see it, demands: incorporation of actual businesswomen to serve as training consultants; intensification of staff efforts to dispel any misconceptions that participants may have; and after completion of no more than two course offerings, careful review of impacts before proceeding further.

c. Housing

Although the CA envisaged the possibility of linking with pertinent organisations in order to facilitate workers access to ongoing and planned housing projects, the scarcity of projects

for which workers were eligible on the one hand, and the ill-advisedness of having the FWC become directly involved in beneficiary selection for other agencies on the other, suggested that the project should play a more limited role in this sector. Preparation of research reports on worker housing characteristics, designs of financial arrangements that might be appropriate for workers, and other activities of a supporting nature are all that the FWC should do with respect to housing.

d. Health

Components of the health program outlined in the CA included: family planning, prenatal, and postpartum services and education; provision of pharmaceuticals; and organisation of a health referral service. Until now the project has put principal emphasis on health education, registering 66 workers in three family planning courses and turning out 60 graduates. This course has been very popular, but apparently less because of the "planning" dimension and more because of the general knowledge it provides to workers about how a body functions. Because of this experience, and because the potential role of the FWC in direct service delivery and referrals is unclear, the project should maintain its emphasis on education and at the same seek to broaden the issues covered by the courses. This includes incorporation of AIDS disease into the family planning course and development of new courses that respond to other priority concerns of workers (e.g. occupational health). Systematic documentation of experiences and impacts of health education should also be initiated in support of funding proposals.

e. Literacy

Literacy training was not included in the CA but the project's discovery that almost half of all workers in some factories were illiterate, that there were few adult literacy programs in the city, and that factory managers were interested in having such training offered to their workers (thus providing the FWC a means of entry into factories), suggested that a pilot program was warranted. The program started with 18 workers and ended with 14, 10 of whom would probably obtain passable competence in reading, writing, and counting after 150 hours of instruction. My estimate from available data is that, excluding front end investments in development of training materials, a literacy program can be conducted at a cost of about $100 per worker, and that approximately 60% of participants could achieve basic literacy at the end of 150 hours. Such figures compare favorably with those of programs being implemented in rural areas, and also suggest the level of cost-effectiveness that other FWC courses can achieve once teaching responsibilities shift from staff to monitors. What the project needs to do now

is to document the experience, to seek funding for an enlarged program (especially from factories), and to find an organisation willing to implement the program in collaboration with the FWC.

f. Vocational Training

Ideas for vocational training mentioned in the CA have not been pursued. Reasons include staff preoccupation with other priorities and lack of support from factories. Workers were interested in such training, but the skill areas they identified (e.g. embroidery, pastry making) were for the most part those already offered by hundreds of public and private domestic education centers in the city, and that have no obvious connection with employment possibilities inside or outside the industrial sector. Moreover, major organisations like the INFP, the national vocational training institute, are struggling to define the meaning of appropriate vocational training for Haiti. Skill areas traditionally associated with such training appear to have no more connection with labor market realities than those covered by domestic centers. Given the situation, staff and I discussed the possibility of working with workers to uncover "life skills", like first aid and house repair, that may provide economic benefits (indirectly); and then of developing pilot courses with other training institutions for the workers. The FWC will pursue this approach further in coming months.

g. Training Materials

Development of training materials is a continuous process in the FWC, as is the process of revising them in light of the experiences acquired in the classroom. A minor difficulty this posed for staff was the inconsistency between what they were actually doing and what they thought they should be doing. While they believed that they were supposed to be preparing training "manuals" on specific subjects, they have actually been developing what I prefer to call a training "resource file." This file contains major sector headings, like health, within which there are subheadings or chapters on specific subjects like contraception or occupational health hazards. Moreover, the contents of the file are in constant change as materials are added, dropped, or modified. Also, unlike manuals, the file provides the possibility of assembling chapters and sectors in different ways to suit different audiences. Because this approach is not only consistent with what staff have been doing but also what the project requires, staff and I agreed that the idea of manuals should be abandoned and replaced explicitly with the concept of a resource file.

III. Participation

Because the guiding philosophy of the project is structured around concepts of active participation and self-determination of workers, and because project staff take this approach very seriously (as contrasted with mere lip service often given to such statements), the matter of participation is of great importance. Evidence available suggests that considerable progress has been made in this regard since inception of the project. There is no shortage of sustained interest in FWC programs among workers, and demand by them for more and/or a greater variety of offerings has grown. Because the challenge of promoting participation is formidable in a country lacking participatory traditions (indeed, with a tradition of suppressing it in recent decades) and divided along social class lines, a circumstance compounded by the more universal culture of professional-client relationships, further progress will require intensification of staff efforts to incorporate workers into the daily activities of the FWC. Such efforts may include using workers to select new participants (rather than having it done by factory managers), shifting attention from expanding the number of participating factories to expanding the share of participating workers in a lesser number of factories, encouraging more workers to become monitors in FWC programs and to act as full decision-making partners with staff, and exploring possibilities for joint training sessions with the Management Productivity Center which is now providing training to factory supervisors.

IV. Research and Evaluation

In the interest of gathering broader quantitative information on factory workers and of evaluating project progress and impacts, the CA incorporated a research and evaluation component into the FWC. An early activity here was a baseline socioeconomic study that surveyed 265 workers. Conditions during the survey period were difficult, but the project collected what appear to be data of high quality. Unfortunately, lack of appropriate expertise within the project at the outset not only prevented rapid translation of the data into useful information and analytical reports by staff, but also served to misguide efforts that were made to secure necessary expertise from outside to train staff and to conduct certain analytical tasks. Clarification of this situation emerged for discussion during the evaluation, and with revisions made to simplify and focus the tasks of research staff, the work is once again on track. Included among these revisions are a small survey to correct certain inconsistencies in the baseline study, replacement of future baseline surveys by one covering past and present participants in the FWC, a reallocation of analytical responsibilities among staff and consultants, extensive

streamlining of evaluation activities, and replacement of a "productivity" impact study by a smaller and more manageable worker output study.

V. Implementation Plan

The project is moving ahead more or less on schedule, but its timetable requires a comprehensive revision in light of changes that have taken place in programs and priorities among activities, and in the light of budgetary constraints.

VI. Project Staffing

The number and qualification of project staff are adequate for FWC needs at present. The project nevertheless seems to require somewhat more attention to efficient use of its human resources with respect to allocation of tasks. It also seems to require intensification and acceleration of efforts to recruit and train monitors to take over training and other activities that have been implemented by staff and consultants until now.

VI. Advisory Committee

The first meeting of the Advisory Committee took place during the evaluation. The 15 members of the Committee, drawn from the sectors of government, education, housing, health, industry, and law struck me as both highly competent and highly motivated to assist the FWC. They constitute a valuable addition to FWC resources, and should serve well as counselors and as members of the project's Board of Directors when it institutionalizes itself as an independent Haitian NGO.

VIII. Institutionalization

Efforts to begin the legal paperwork associated with converting the FWC into a self-standing NGO should start very soon. But more important is the need to focus energies on securing funding to carry the project beyond the scheduled expiration of the USAID-OEF CA in July 1988. To date the project has secured the promise of $28,000 in grants from PACT, Citibank, the Canadian Embassy, PROFAMIL, and the Hewlett Foundation. This is a good beginning, but relative to current project expenditures of $13,000 per month (excluding OEF overhead), it is evident to staff that more needs to be done. To that end, the project has given fund-raising its highest priority, both in terms of efforts by FWC staff in Haiti and efforts by OEF staff in the U.S. This priority is manifest in earlier discussions where I mentioned the need to produce documentation on programs in support of funding proposals.

IX. General Project Management

Financial and administrative management appear sound. Issues warranting attention are: the need for a revised budget to indicate the exact status of resource commitments relative to requirements; the need, noted earlier, to recruit monitors for program implementation and thereby move the project to a more appropriate level of cost-effectiveness; and a need for a second staff retreat (the first took place in January 1987) to identify, discuss, and resolve matters of organisational and administrative dynamics associated with participatory management. These suggestions should not detract from my statement about the essential soundness of management. Staff of the FWC and OEF are to be commended for their patience, competence, and dedication to the project, and for making it accomplish as much as it has in the face of numerous barriers to progress.

X. Other Matters

Finally, as detailed in Annex 3, USAID has requested my response to four sets of questions concerning the project. The first is whether the FWC is an appropriate mechanisms to upgrade worker skills and living conditions relative to alternatives, and whether it is cost-effective. Alternative mechanisms include USAID support of other agencies already active in providing micro-enterprise training, health education and services, literacy programs, vocational training, and research. Whether always practical I cannot say, but it is relatively certain that there are many organisations willing to at least explore the possibility of developing programs for factory workers with additional funding. But this is not to suggest that such alternatives and the FWC are necessarily mutually-exclusive. No matter which organisations might be involved, every one of them would have to replicate what the FWC has already done in terms of starting from the beginning with new materials and teaching/-research practices. In a sense, especially if the FWC refrains from engaging in direct service delivery, the project has done some of the basic homework for other agencies. In that sense it serves as a complementary activity to service agencies, and strikes me as doing appropriate work. In addition, it is difficult for service agencies with narrow agendas to focus largely on a particular group of women, to engage in very serious efforts at participation and integration of beneficiaries into the decision-making process of the agency, and to allow the beneficiaries to direct the agency all at the same time. These things are important in their own right in a country where "targets," especially women, are rarely asked to voice opinions on whether or not they want or need particular services. In giving people such voice, I cannot but think that the FWC is very appropriate. Its costs are high at the moment, but with efforts to add monitors in coming months, it should achieve a level of cost-effectiveness as appropriate as the substance of what it does.

The second set of questions asks whether the FWC is a "luxury" project, using resources to assist a relatively privileged group of people. Although average factory worker wages may be slightly higher than for the urban population as a whole, the distribution of income among worker households described in Annex 5 provides strong evidence that most are poor even by Port-au-Prince standards, and that most of these poor households are very poor. That is, factory workers are spread across a cross-section of the city's low-income population. They are not relatively privileged in terms of meeting basic household needs, and the FWC is therefore no more a "luxury" undertaking than any other project oriented to the city's poor.

The third set of questions asks why women showing potential have not yet received special training for leadership roles in the project. While staff remain committed to such training and will move forward with it, progress to date has been slowed by preoccupation with other priorities and by the inherent obstacles to participation and integration mentioned in Section III, above.

The last set of questions, to some extent already answered in response to the first set, asks whether the FWC is facilitating access to service programs or is attempting to create new ones - thus duplicating what already exists. The project's current image of itself is that of a training/research entity only, with the issue of services confined to identification of service needs and advocacy on behalf of workers to encourage provision of the services by other organizations.

SUMMARY OF RECOMMENDATIONS

The findings of the mid-point evaluation, synthesized in the foregoing Executive Summary, yields 43 specific recommendations, as follows:

I. Construction of an FWC Facility

1. the project should not pursue construction of its own facility at this time; and
2. it should nevertheless explore possibilities for collaboration with other NGOs in developing a shared facility in the future.

II. FWC Program

a. Core Course

1. staff should attempt to highlight from the outset how all the elements treated in the course can serve to increase income of workers;
2. they should explore the possibility of eliminating the self-standing Core course and then replacing it with a Core introduction to all other courses offered by the project;
3. to further the process of building trust between staff and participants, workers should be encouraged to reverse roles and organize a Core course for staff; and
4. staff should initiate an ongoing process of documenting the experiences, lessons learned, and impacts of the Core course to serve as supporting material in funding proposals.

b. Micro-Enterprise

1. to render the course more realistic, the project should recruit women already engaged in micro-enterprise to serve as training consultants;
2. continued efforts by staff are required to dispel the notion among many participants that completion of the course would facilitate access to project or other donor agency loans;
3. planned sessions of the Core course that will be oriented to transferring "soldes" into credit union type funds should be incorporated into the micro-enterprise course; and
4. the project should carefully assess any negative impacts of the present and the next course before committing itself to more than two course offerings.

c. Housing

1. the project should restrict its involvement in this area to preparation of working papers and other documents that may be of use to agencies directly involved in the housing sector.

d. Health

1. in addition to the special seminar which it has already organized, the project should incorporate material on AIDS disease directly into the family planning course;
2. prior to launching new types of health courses, staff should undertake a consumer demand survey to identify subjects of priority interest to workers;
3. the project should intensify its research effort on occupational health in the industrial sector;
4. staff should immediately discuss with PROFAMIL the possibility of re-orienting funds presently earmarked for an FWC family planning service, to reproductive health education;
5. a strategy and timetable for delivery of different types of courses over the life of the project should be developed and incorporated into the overall implementation plan; and
6. for the same purposes as noted in recommendation a.2, the project needs to initiate an ongoing process of documenting the health program.

e. Literacy

1. documentation being developed in support of funding proposals should be comprehensive; and
2. every effort should be made to convince factory owners and managers of the desirability of having factories finance all or a significant portion of the costs of making their workers literate.

f. Vocational Training

1. in collaboration with workers, staff should seek to identify priority daily life skills that, if improved upon through training, might yield economic benefits;
2. as these priorities become evident, staff should identify local resources available to provide, or to assist in the provision of requisite training;
3. pilot training sessions in skills eliciting greatest worker interest should be implemented within the project;

4. such sessions need to be fully assessed and documented, and if appropriate, staff should develop funding proposals on the basis of the experience for submission to interested organisations; and
5. all such documentation ought to be shared with public and private organisations already engaged in providing vocational training.

g. Training Materials

No formal recommendations are offered on this subject, although I note that staff efforts to shift from a "manuals" approach to a "resource file" approach in developing materials are appropriate.

III. Participation

1. past and present participants should be encouraged to select and invite new participants into FWC programs;
2. staff need to intensify efforts to integrate workers more closely into the project, including incorporation of some workers as monitors/animators and as full decision-making partners with FWC staff;
3. rather than attempt to maximize the numbers of involved factories, the project should focus on increasing the share of workers drawn from current participating factories while at the same time adding a few more to the current list; and
4. the project should explore the possibility of collaborating with the Management Productivity Center in organizing joint training sessions for workers and supervisors.

IV. Research and Evaluation

1. completion of the baseline study should be a top priority for the project;
2. consideration should be given to conducting a second baseline survey in January, this time restricted to past and present participants in the FWC;
3. even without awaiting completion of the baseline study, another priority should be extraction and analysis of data on topics deemed important by staff;
4. upon completion of the baseline study, the project should consider making the raw data available for sale;
5. responsibility for supervising preparation of autoevaluations by monitors should be taken over by the Project Director or Training Coordinator;

6. the "global" evaluation should be replaced by systematic efforts to document stories and anecdotes of workers that suggest possible program impacts;
7. the entrepreneur survey should be conducted face-to-face; and
8. if still deemed essential by the FWC and USAID, and if complete and willing cooperation is forthcoming from factories, a small worker output (as distinct from productivity) study should be implemented.

V. Implementation Plan

Beyond notations concerning revisions to specific line items, no formal recommendations are offered on this subject.

VI. Project Staffing

Recommendations on this subject are integrated into Section IX, below.

VII. Advisory Committee

1. staff should share all documentation prepared for general diffusion with every member of the Committee for information, review, and comment; and
2. between formal meetings of the committee, staff should seek counsel as appropriate from individual members.

VIII. Institutionalisation

1. the project should immediately incorporate the FWC as a legal NGO with independent status;
2. top priority must now be placed on seeking additional funding; and
3. the search for funding should include a coordinated strategy between the FWC and OEF.

IX. General Project Management

1. FWC and OEF staff should immediately determine the exact status of the project's budgetary commitments, and then develop alternative strategies for adjusting lines in manners that will assure completion of key project activities; and
2. the project should organize a one-week seminar or retreat to identify, discuss, and resolve any difficulties associated with organisational and administrative dynamics in the office.

INTRODUCTION

As set forward in Cooperative Agreement No. 521-0182-A-00-5038-00 (Non-Governmental Support III, Input No. 7) between USAID and OEF International Inc., the purpose of the project is to establish a Factory Worker's Center (FWC) in Port-au-Prince, Haiti, that would undertake activities and programs focused on improving the socioeconomic circumstances of participating workers through upgrading of their skills and their productivity as workers, and through promotion of a process of self-determination. By these means the project also aims at demonstrating to participating factories that improvements in the socioeconomic circumstances of workers can contribute to increased factory productivity.

The Cooperative Agreement (CA) became effective on August 2, 1985, and is scheduled for completion by July 31, 1988. This report contains the formative, mid-point evaluation of the FWC project called for on page 7, attachment II, of the CA. The report is based on interviews I conducted with the individuals noted in Annex 1, and on materials I collected during two visits to Haiti (February 24-28 and March 11-28, 1986) and one visit to Washington (April 1-4, 1986).

Organization of the report parallels the organization of issues and evaluative questions posed in my terms of reference (Annex 2, pp. 2-8), and in an addendum introduced by USAID to those terms of reference (Annex 3). As closely as time and practicality would permit, my work followed the methodology for evaluation outlined on pages 9 and 10 of the terms of reference. I performed a critical review of the project's documentation. I held many individual and group interviews with staff, beneficiaries, factory managers and supervisors, OEF and USAID personnel, and representatives of a large assortment of other institutions. I reviewed data collected on project activities. And I visited several ongoing training courses.

The evaluation process did not exactly conform to all five steps suggested in the terms of reference. Specifically, the Evaluation Committee did not include a factory manager during its three formal meetings. Scheduling was the problem here, and I therefore met with the manager separately to glean his inputs to the process. Also, the four beneficiaries in the Committee did not participate in the design workshop, though they were present during two data analysis and recommendation workshops. By and large, however, the evaluation retained its participatory character, with all principal actors represented in all key phases of the process.

Because a participatory evaluation does not necessarily imply agreement or consensus on all issues treated in the process, there are places in the report where the reader may note differences of opinion concerning what the project should or should not do, and where I note that my opinion differs from that of others. The recommendations I put forward are therefore not always sustained with broad agreement among individuals closely associated with the project. This should not imply that I insist upon adoption of such recommendations. Insistence would be counterproductive for a project that prides itself on participatory design, management, and implementation. The recommendations remain in the report only as a record of ideas exposed during the evaluation process.

The fact that I may disagree with others here and there must not overshadow my strong conviction that the FWC has thus far proven itself an excellent project. Prior to the evaluation I doubted that I could arrive at such a conclusion. I shared the widespread notion that the target population, factory workers, represented a relatively privileged income group that did not warrant donor attention. The nature of the project also seemed very nebulous, especially given its stated goal and purposes. For example, how could one reconcile an effort at what looked like "consciousness raising" (or so it appeared to me) with employment expansion?

But three weeks of immersion in the substance of the effort has made me a believer not only in what the FWC is trying to do, but also in its demonstrated capacity to actually achieve results through a participatory approach to adult education. I commend the USAID mission for having elected to support this project, and OEF for having organized it. I most especially wish to commend the FWC staff for the energy and dedication they have invested, often under very difficult circumstances, into making the project work in such a brief period of time.

I. CONSTRUCTION OF AN FWC FACILITY

The Cooperative Agreement called for the FWC to build a facility of about 1200 square feet on a site close to or inside the industrial zone. To this end the project searched for a suitable parcel and was eventually offered one of 1200 square meters for a price of $15,000. Thereafter, the Minister of Finance agreed in principle to have the government purchase the parcel and then have it leased to the FWC, an operation that would bring the annual cost of land to a small fraction of its purchase price. The Bureau des Contributions is presently, or will soon, examine the case in order to determine an appropriate land rent rate. The Bureau is slow on such matters, and an answer is unlikely to be forthcoming for at least six more months.

Although the parcel may eventually fall into FWC hands, construction strikes me as ill-advised at this time, for four reasons. First, a minimally adequate facility of 400 square meters would cost $80-$100,000. The project budget has $40,000 available for construction. Therefore, without additional financing, construction of an appropriate facility would prove feasible only with participation of other agencies having interests in a location within the zone.

Second, prospects for additional funding of FWC programs beyond the next 12 months are uncertain. Investment in a facility implies a certain degree of permanence in a project. Without clarity about the longer-term survival of the project, the wisdom of making an investment of this type is not evident.

Third, as I note in section IX, below, the project is facing current budgetary constraints which may demand that funds earmarked for construction be reallocated to other essential programmatic uses.

Finally, general practice among non-governmental agencies, especially newer ones, is to rent rather than own property. Aside from the inherent advantages in terms of cost-effectiveness (e.g., the project pays $7000/yr. in rent, or one-twelfth the cost of building), NGOs are by common conception supposed to use resources for services rather than property investment. Few NGOs in Haiti own property, and construction of an FWC facility might send out inappropriate messages to the NGO community about project priorities.

None of this suggests that there is no need for a much better service facility in the zone, but under present conditions I do not think that the FWC ought to take a financial leadership role in the matter. In this context I make two recommendations.

Recommendations

1. The project should not pursue construction of its own facility until such time as its long term financial circumstances become much clearer.

2. The project should nevertheless explore opportunities for collaboration with other NGOs (or government agencies if such collaboration does not undermine the project's credibility) with regard to construction of a shared facility that can offer a multiplicity of services to industrial workers.

II. FWC PROGRAMS

The CA outlined several possibilities for program interventions on behalf of women workers. These included a Core or Human Resources course, micro-enterprise training and assistance, a housing component, health education and services, vocational training, and the elaboration of training and related materials for all the above.

Experiences over the first 18 months of the project, which included simultaneous assessments of worker preferences on the one hand and practical feasibility on the other, and changes in the political order of things in Haiti, yielded a rearrangement of initial program ideas, directions, and priorities. In general, the experiences suggested that the project place highest priority on its training function, and in particular on a participatory approach wherein training was understood to mean efforts to encourage women to take more charge of various important aspects of their lives (as distinct from more traditional notions of formal technical instruction). Of lesser significance but important nonetheless, a second priority came to be efforts to bring services rendered by other organizations to the workers. The idea that the project should directly provide non-training services in the near term (i.e., the next 12 months) is no longer present; although the door remains open to eventual provision of such services in the longer term.

This sense of prioritization was not self-evident when I arrived for the evaluation. It became clearer to staff and myself as we discussed the matter over the course of several weeks. Having been party to the process of arriving at this arrangement of priorities, I cannot but concur with it. Considerable work remains to be done with respect to identifying and prioritizing various kinds of training of interest to workers that the project might wish to pursue, and to securing the interest of service-oriented institutions in extending their reach to address factory workers. But this work is of an evolutionary and interactive nature, requiring ongoing dialogue with workers and pertinent institutions. It will take time to bring to full fruition. The process, however, is underway and well in hand, as should be evident in the following summary of the status of each program mentioned in the CA.

a. Core Course

The Core or Human Resources course, developed primarily from two OEF training manuals, Women Working Together and Navamanga, is the central focus of the whole project. Through a process of participatory exchange among women, including staff, the objectives of the course according to the CA, among other purposes, are: to heighten the level of self-respect among

workers; to expand the range of areas over which workers can claim some degree of self-determination; and to expand the number of life areas in which women might find it helpful to work together rather than alone or in competition with each other. This kind of agenda is inherently nebulous, and would seem potentially troublesome in a poor country where people have come to expect that programs and projects sponsored by donor agencies will provide them with some kind of material or otherwise tangible benefit. As one might expect in the circumstances, the course faced some difficulty in organizing itself around the expectations of workers, and in communicating its purposes to them.

The first core course, lasting from May 26 to July 11 with a midstream interruption, started with 21 women from Athletic Equipment and two from Foster Parents Plan and ended with 21 graduates. This show of sustained interest by the vast majority of initial participants was surprising to me, particularly in light of several difficulties encountered during implementation. For example, presentation by staff of an overview of the whole project at the outset of the course reinforced the preconception among some workers that their participation in the course would eventually result in their receiving material benefits like health services, credit, etc. Among workers who could make the distinction between the whole project and the course, others reported that they were nonetheless frustrated by a sense that the course would not lead them "anywhere." These difficulties could not have been extraordinary because the evidence indicates that most workers extracted something of value from the course. A manager in Athletic Equipment reported that for a period of six weeks after completion of the course, i.e., before the gains made in the course were wiped out by (what I interpreted him to imply was) the divisive atmosphere of the factory floor, the workers were lively, animated, cooperative and polite to each other and to supervisors. That something positive and productive had happened during the course was clear. Exactly what had happened remained unclear, as did the specific reasons for the return to "normalcy" after six weeks. But the most telling fact was the willingness of so many of the workers to devote an hour or two after work for active participation in discussions on issues of importance in their lives--issues not always directly or immediately concerned with material benefits. To the extent one can argue that actions speak louder than words, the actions of the workers suggest that the first course was well received.

Processes in the second course (August 11 - September 17) were similar. In this instance 20 workers from Automatic Acusonic started the course and 17 completed it. Above and beyond complaints about lack of tangibility, some workers reported that the staff's efforts to introduce games as "ice-breakers" in the course led a few to think that it was not a serious undertaking. A serious course was supposed to look and

feel like a school classroom. The effects of the second course nevertheless appeared more durable than for the first offering, with managers and workers I spoke with still noting the presence of changed habits in worker interaction almost six months after completion. The factory was in the electronics sector, meaning that workers were better paid and more educated than at Athletic Equipment, and that labor-management relations tended to be relatively more progressive as well. The more durable effect may have therefore resulted in part from more propitious circumstances in the post-graduation period than was the case in the first course. Efforts by staff to improve the quality and content of material, including introduction of human rights and legal issues, and the quality of instruction, may have been equally or more important.

The third course (November 10-21, January 26-February 17), although interrupted by more political turmoil in November and causing a higher dropout rate, was according to staff the best offering to date. Seventeen workers from Quality Products started the course, and twelve graduated. By this time staff was making every effort to clarify that the course offered nothing material, and that it was about how to live, how to talk to people, how to carry oneself in public, how to tolerate the faults of others, self control, and group dynamics. At the same time, staff reduced the number of introductory "get-together" sessions and were thus able to reach the point where issues of potential meaning to workers, like human and legal rights, could be introduced much earlier in the process. Early arrival at such issues-oriented sessions were important not only because they were important issues, but also because the otherwise vague concepts of self respect, self determination and cooperation obtained meaning in the context of such issues. That is, by revealing its pertinence to workers much sooner than in the second offering, workers had less basis for voicing complaints of the types encountered earlier.

Plans for the fourth course involve a further increase in time-efficiency, with ten sessions over three weeks devoted to introductory material wherein workers develop their capacities for relatively uninhibited self expression, and the remaining three weeks devoted primarily to legal and health issues that workers in previous core and other courses found interesting.

Although each offering has had its share of difficulties, the very important observation I extracted from the review was the rapid process by which staff have modified the course to make it less troublesome, more interesting to workers, more efficient in terms of the time required to get workers to express themselves, and, as noted here and there in Annex 4, more effective in yielding identifiable impacts (however predictable or unpredictable such impacts may be). Indeed, I am very much impressed by the fact that it takes only about three weeks to get

workers to speak out about themselves and their circumstances, about what is more and less important in their lives, and about the areas in their lives where cooperation may prove more helpful and effective than individual action (or inaction). Whatever skepticism I may have had about the merits of this course prior to the evaluation, it is gone entirely. Indeed, I now believe that the Core course is the most important component of the FWC effort. With that conclusion in mind, staff and I discussed various ways and means of rendering the core course still more effective, with the result of the discussion taking the form of four general recommendations.

Recommendations

1. Because one may surmise without too much risk of error that a dominant need of most workers is income, or more precisely, money, staff should attempt from the outset to explicitly link all elements of the Core course with that need. There seems to be little in the course that cannot be tied directly or indirectly with the need (e.g., how getting to know each other can lead to tangible forms of mutual help one day, how working together can yield such things as wholesale rather than retail purchasing of food, how carrying oneself in a factory can sufficiently impress management to accede to individual or collective requests for positive changes or certain additional services, and so forth). The same applies to issues that might be raised in the course (e.g., collaboration makes access to legal services less costly, self determination and action on matters of health in the short term reduce outlays in the longer term, etc.). The essential premise of this recommendation is that so long as workers have a need for tangible benefits, there is good reason to highlight how the course can address the need in more ways than they can presently imagine. This kind of applied approach might encourage greater interest from the very first day of the course.

2. Because the experience to date has revealed that effective progress with workers can be made within about three weeks, the need for a self-standing Core course may not be as evident as it appeared at the outset of the project. And because Core material, including the method by which it is conveyed, is the essence of what makes the FWC unique in its approach to training, it should be a prerequisite to all other courses. That is, instead of having a Core course and then separate additional courses, I recommend that staff explore the possibility of organizing every topical course so as to have a 3 to 4 week Core introduction, followed by 3 to 4 weeks (or perhaps slightly more) of training in health, micro-enterprise, law, and so on. In this scenario, workers who have not been in any course would obtain the Core no matter what the topical components might later be, and workers who have had the Core introduction in other courses can join the topical component of a new course after the

introduction has been completed. This suggestion may or may not be practical, but I do recommend that the project give it serious consideration.

3. The Core course has made great strides, but I sense that there still remains a substantial barrier separating staff from workers. Whether this results from a socioeconomic class distinction, from an implicit professional-client or patron-client relationship, or from some other factors, I cannot say. This is a general phenomenon affecting all project components, but one road towards reducing its effect presents itself within the Core course. Specifically, I recommend that the project attempt to encourage workers to design and implement a Core course for staff. This role reversal may help staff become better acquainted with workers, and may encourage workers towards even earlier manifestations of self expression than is now the case.

4. As part of a process of preparing documentation in support of the search for funding of other FWC components like health or literacy, staff should prepare material which: synthesizes the experiences of the first three or four Core courses (noting how purposes, procedures, and worker reactions changed over time); draws out the lessons learned; highlights the advantages of the course in cultivating participatory learning; and identifies the kinds of impacts that occur when Core material is combined with other, more focused educational subjects.

b. Micro-Enterprise

As envisaged in the CA, the project initiated a micro-enterprise training course in February 1987. Participants included 8 workers from Automatic Acusonic and 10 from Quality Products. Subsequently, 4 workers were laid off by Automatic Acusonic, leading to the possibility that enrollment might drop from 18 to 14 before the scheduled end of the course in April.

The course material, adopted primarily from an April 1985 document prepared by OEF, "Faire Une Etude de Factibilite," appears appropriate for the purposes of the endeavor, which is to help women decide whether a business or investment idea is good or not, and my interviews with participants revealed considerable interest in, and enthusiasm about the subject. I nevertheless expressed four reservations to staff about the premises, orientations, and substance of the effort.

The first of these reservations was the limited qualifications of project staff. Although ably qualified to present and discuss the material, the two staff members responsible for teaching the course have no experience in business, micro-enterprise or otherwise. By itself this limitation would not present a difficulty if workers had some

business experience. In such an instance theories about how to carry out a feasibility study expounded upon by staff would constitute a useful exercise in formalizing and making explicit what workers would already understand informally and implicitly. The course would thus represent a refinement upon existing knowledge and skills of participants. Indeed, much of the OEF material on this subject seems ideally suited to women already active in the informal sector. But the women in the course do not have the experience. Consequently, the course remains highly abstract and oversimplified. It misses much of the daily dynamic complexity and intense competition that characterizes micro-enterprise activity, and therefore conveys much less information than is really required to assess the practicality of a business. It is not a realistic or accurate introduction to the subject matter.

My second reservation has to do with the perceived orientation and purpose of the course. Participants I talked with, beyond expressing a general thirst for knowledge, suggested that their prime interest in the course was to find a means to escape the oppression of factory work. They preferred to work for themselves so that their earnings could better reflect the level of thought and energy they invested into their work. They also recognized, accurately I think, that average earnings from independent micro-enterprise were generally comparable to factory wages. The course, in this context, was perceived by most women as a vehicle by which they could one day abandon their jobs. Some staff, though not the ones teaching the course, shared this perspective.

The problem here is that this perspective is not the one which the two instructors are trying to promote. Their notion is to empower workers with knowledge that might help some to evaluate the possibility of developing secondary income sources (for themselves or for other members of their families), others to assess the feasibility of business as a solution to shortfalls in income associated with temporary layoffs or dismissals, and still others to assess investment ideas in the event of finding themselves with "excess" funds. Multiple interpretation of the same phenomenon is normal, but in this instance, especially given what I consider a course offering very oversimplified content, it seems essential that the perspectives of workers and instructors come closer together.

The third reservation has to do with the idea held by staff and beneficiaries that participation in the course can by some means or other be linked to ongoing or proposed small-enterprise credit schemes. My conversations with representatives of FHAF, HDF and MEDA, all of which are active in lending to small enterprises, yielded a conclusion to the effect that opportunities for lending to individuals without business experience, and who are not actually engaged in a business that is at least two years

old, are almost nil. Only factory workers with active sideline business activities stand some chance of obtaining credit from organizations like the ones I contacted. For other workers, as is discussed during one session of the course, starting capital must come from personal savings, transfers from family and friends, or commercial lenders. Retention of the notion of a potential link to small-enterprise credit projects may misguide participants. Indeed, it would be prudent to cultivate the idea that opportunities for such loans are practically non-existent.

My last reservation concerns the relationship between the course and the intense level of micro-enterprise activity carried out by women on Port-au-Prince. Haiti has one of the highest rates of female labor force participation in the world, and I would hazard a guess that of the roughly 300,000 working women in the city, 150-200,000 may be engaged in micro-enterprise of one type or another. Competition for sales between them is extraordinarily intense. As a consequence, in theory at least, one may view attempts to add still more competition (by helping factory workers enter the market) as an effort which operates to the detriment of those already in the market. That is, in trying to assist factory women, the FWC may be indirectly hurting other women who are engaged in micro-enterprise. This relationship may be more conceptual than real, but it raises the issue of the appropriateness of the course within the project's broader agenda of assisting all women rather than a particular subgroup.

At this point I must emphasize three things. First, my reservations about the course are not specific to the project. I have encountered this situation more times, in more countries, and at more different levels than I care to think about. I have consistently argued against such courses wherever I have been asked to render an opinion, be in India for the World Bank, Tunisia for USAID, or Minneapolis for the Small Business Administration, and always for the same reasons: trainers do not know enough to convey useful information, and training materials do not broach the subject realistically.

Second, project staff and I are more divided in our opinion of the merits of this course than on any other component of the project. I believe the course (including OEF material) highly inappropriate. They believe it to be very appropriate and necessary. I believe they are wrong, and that the course should be terminated. They believe I am wrong, and that the course should be maintained, strengthened, and expanded.

Third, my opinions and my dispute with staff, in the context of a participatory approach to learning, must for better or worse remain subservient to the expressed desires of factory women. They seem to want the course. I discussed this dilemma with staff, and together we reached a compromise on four recommendations.

Recommendations

1. For the purpose of making the course more realistic, staff should seek and recruit one or more businesswomen experienced in the types and scales of enterprise in which participants might reasonably hope to engage themselves. These businesswomen should act as consultants, and should be encouraged by staff to communicate to participants the concrete circumstances, dynamics, and difficulties of starting and operating an enterprise; and to communicate the perspectives held by businesswomen about the advantages and disadvantages of factory work.

2. Staff should continue to make every effort to dispel the notion among participants that completion of the course might enable them to obtain loans from the project or from other sources sponsored by public or private donor agencies.

3. Staying on the subject of credit, because the project is already working towards the possibility of transforming "soldes" into interest-bearing, credit union type funds, and because it is planning to introduce training in the operation of such funds into future Core courses, the same material should be added to the micro-enterprise course.

4. The project should not commit itself to offering more than two micro-enterprise courses: the present one and another. Before planning or launching more courses of this type, staff should carefully identify and assess any negative effects of course completion upon participants (e.g., potential frustration at the absence of follow-on services or actions that could assist them in a move into business). More broadly, in collaboration with workers, staff should assess the wisdom of continuing to a third course and beyond in the light of all other tasks and priorities which the project may have at that time.

c. Housing

The CA indicated that the project might involve itself in the housing sector by coordinating with other institutions in order to facilitate participation of workers in ongoing or planned housing programs. Project staff did make contact with the public housing agency, the EPPLS, and with the mortgage bank, the BCI. Because the EPPLS had not yet developed a project suitable for most workers, because the BCI had yet to develop a program for families with incomes below $300 a month (i.e., for which most workers could qualify), and because project staff believed it unwise and inappropriate to become directly involved in selection processes associated with EPPLS and BCI program components for which some workers might qualify, the project has not given housing particular attention. While there could be some arguments raised to justify more effort in the matter of

housing, as long as the FWC has little or nothing to coordinate with institutionally, little purpose could or can be served in suggesting that the project do more.

Staff and I nevertheless agreed that the project could play a supportive role with respect to background research on housing characteristics of workers, with respect to assisting in the design of financial access components in future low-income housing programs, and, if requested, with respect to providing training in financial matters to women within any private or public housing projects that may be implemented on their behalf later on. In this context, I make only one recommendation.

Recommendation

1. With data and analyses extracted from the baseline survey, the project should prepare and distribute one or more working papers on housing characteristics of factory workers, touching upon such themes as home ownership, types of land and building rental arrangements, household residential mobility, rent structures, and relationships between household income and rent outlays. Extending beyond analysis, the paper(s) should if possible outline the basic elements of financial arrangements that might prove satisfactory to different groups of worker households, and which designers of low-income housing programs might wish to use as inputs to their work. It should also describe the kinds of training that workers (or others) might need in order to fully understand and satisfactorily adopt housing payment arrangements that typical programs have, but which are alien to worker experiences. Distribution of such a paper(s) to organizations interested in housing may thereby highlight the FWC's analytical, design, and training potential all at once, and may eventually yield requests for some kinds of FWC assistance in housing efforts.

d. Health

Possibilities for work-related health programs envisaged in the CA included family planning, prenatal and postpartum care, provision of pharmaceuticals and organization of health referral services. Although the project has touched upon some of these possibilities, the central effort has thus far focused on health education, with a primary orientation towards family planning education. The curriculum covers such topics as reproductive systems, fertility control, the economic value of planning, contraception, venereal diseases, and training in use of family planning clinics.

The first of three courses offered to date started with 27 trainees from Quality Products. It ran for four weeks at two sessions per week and yielded 25 graduates. The second course, also involving two weekly sessions over a period of four weeks,

started with 10 workers from Bright Ideas and ended with 9 graduates. The last course returned to Quality Products, started with 29 workers, ended with 26, and added material on prenatal, postpartum and infant care. To make room for the additional material, staff increased the weekly sessions to three and extended the course by two weeks (i.e., making a six-week offering).

Other than the general disruptions that affected all project components in October-November 1986, the health education course encountered no extraordinary difficulties. The most significant challenge had to do with the instructor's capacity to develop a participatory approach to education. As a long-time administrator in the Ministry of Public Health and a well known television personality used to lecturing, giving public addresses, and loud conversations, she reported some difficulty in "withdrawing" from the leadership function in the course. She nevertheless did so, and the courses proceeded in the participatory fashion originally envisaged. None of the participants I spoke with mentioned any reservations about the course.

However, most of the workers did imply that their reasons for attending had little to do directly with family planning. They were there to learn things that they did not know or clearly understand. For example, several mentioned that they were perfectly capable of controlling births by one means or another. What they appreciated was the knowledge they acquired about their own reproductive systems, how the systems functioned, the ills that could afflict the systems and what to do about them, the explanation of the reasons why various methods controlled fertility, and the various advantages and disadvantages of different methods. In some respects their interest in the material had the same basis as the interest shown by U.S. women in a widely read book, Our Bodies, Ourselves.

Not surprisingly, when I opened up the discussions to ask if there were any other health-related subjects that they wanted to know more about, workers quickly mentioned such things as breast cancer, ulcers, and AIDS disease. They also mentioned, corroborating a matter brought up earlier by the staff instructor, all manner of workplace ills, including: fingernail erosion while working with chemicals, eye infections, nausea, and other reactions to what they believed were occupational hazards. Their particular frustrations with respect to occupational health were that they found difficulty understanding some of the causes for their ailments, and they did not know what to do to lessen or eliminate the effects.

Out of these discussions with staff and participants I developed a sense that while the family planning orientation of the health education course was a useful point of departure, "planning," per se, was not the central interest of the factory

workers. Given their general ignorance of so many aspects of health, and their equally general thirst for knowledge about this and other issues, they appreciated most elements of the course. But in my opinion they did not necessarily see the elements as being of significance only to planning. In this context, I've drawn the conclusion that courses offered in the health education program should be broadened to include more subject matters that women might have particular interests in.

This conclusion seems particularly important because the course seems to be effective in helping women take greater charge of their own health, as several of the vignettes in Annex 4 suggest. Although staff did make some early efforts to refer women to clinics like Bon Repos Hospital and Eyecare, and did at one time contemplate establishing a project clinic for workers, neither of these ideas seem practicable in a near future. It does not take much in the way of referrals to overload the city's limited public and private clinics, and as long as factories continue to provide workers with some modicum of health services, the need for the project to have its own clinic is not obvious (although assessments of the quality of service offered by existing clinics might still remain within its purview). That is, the project's strength seems to lie in a participatory approach to health education (that has no apparent parallel in the country), which helps women understand what ails them, and which encourages women to seek out appropriate remedial services. This approach is what the project should strive to strengthen and broaden, and the recommendations that follow are set within this framework.

Recommendations

1. Although the project has organized a number of general seminars on AIDS disease, material on the subject is absent in the health course. Because workers are very concerned about the illness, staff should incorporate a component on AIDS into the course as soon as possible, perhaps somewhere in the discussion of venereal diseases.

2. Before launching new kinds of health courses, like one planned on prenatal and postpartum care, staff should undertake something like a consumer demand survey to identify priority health matters that factory workers, given a choice, would prefer to learn more about. Out of this survey the project should attempt to assess the feasibility of obtaining information and providing adequate instruction, and then develop the necessary materials in the form of specific chapters within a more general resource file on the subject of health. Because interests may vary among workers, the chapters can be assembled in different ways to address different audiences. The purpose of this exercise will be to develop a small assortment of different demand-responsive courses that could be offered not only by the project, but also shared with other organizations.

3. Within the framework of the foregoing recommendation, staff should intensify the project's ongoing research effort on the subject of occupational health in the industrial sector. This effort should include: collection of pertinent data on the actual situation from nurses and doctors in a sample of factories and in the Industrial Park's dispensary; and through the good offices of the ILO, WHO/PAHO, OEF/Washington, and other pertinent agencies, collection of background studies and other materials that list or otherwise describe the types, characteristics, symptoms, and remedies for occupational health hazards in different kinds of workplaces.

4. In indirect support of recommendations 2 and 3, the project should immediately discuss with PROFAMIL (and/or USAID) the possibility of re-orienting a grant of $10,000 earmarked to the project. At present the funds are allocated to equipment, contraceptives, and staff salaries in what was supposed to have been a family planning clinic run by the project. The project should attempt to secure a change wherein the funds can be used for reproductive health education rather than direct service. In that way the family planning courses could continue with supplementary personnel while the staff person in charge of health redirects her attention to recommendations 2 and 3.

5. Assuming some degree of success in carrying out recommendations 2, 3 and 4, the project should develop a strategy and timetable for delivery of different types of courses over the balance of its life, and this timetable should be incorporated into the project's overall implementation plan.

6. With a view towards seeking supplementary funding, the project should prepare documentation about health characteristics of workers (from the baseline survey and other sources); the rationale and approach to health education being pursued; and the characteristics and impacts of the courses offered to date. The search for funds may be oriented in whatever direction appears promising, i.e., under such rubrics as family planning, infant care, AIDS control, or occupational health. But whatever the orientation, the central focus on "participatory" educational process should remain dominant because that aspect seems to be the unique property of the project, and its primary strength.

e. Literacy

The CA did not identify literacy training as a potential program for the FWC, but various factors combined to suggest that an experimental or pilot offering would be worthwhile. One factor was the high rate of illiteracy among workers. Subsequent analysis of the baseline survey data, for example, revealed that 32% of all workers were illiterate, and that in factories paying closer to the legal minimum wage, like baseball producers, some 47% of workers were illiterate. A second factor was the scarcity

of institutions providing adult literacy education in the city. Although Mission Alpha, the literacy program of the Catholic church had apparently explored possibilities for providing services to workers within factories, the exploration had yet to yield a program. Also, Mission Alpha's pedagogical materials, developed for general purposes of rural literacy efforts, were not entirely appropriate for urban applications, thus undermining such efforts as it was undertaking in residential neighborhoods. A third factor was the interest of factory managers in having more workers become literate. Factories that might be less than fully enthusiastic about training in other matters welcomed literacy efforts. That is, such training offered the project a means of entry (literally as well as figuratively) into factories.

However, the most important factor seemed to be the interest shown by women in becoming literate. According to staff, consultants, and participants I talked with, literacy offered several benefits to workers. These included: enhanced social status, a factor important in inter-worker relations on the factory floor as well as in general; a capacity to understand and check on quantities of items produced (which served as the basis of their wages) before signing their names to payroll ledgers, leading to a lowering of the suspicion (and tendency) that supervisors attributed less production to workers than they actually achieved; to open a door to knowledge acquisition through reading that would otherwise remain closed; and to prepare for other FWC training programs where literacy might prove advantageous.

Whatever the actual set of motivations, manifest interest revealed itself in several ways. For example, more women showed up to enroll for the program than the project could accommodate. More to the point, as noted further below, was the low dropout rate. Notwithstanding recurrent ridicule by non-participating workers on the shop floor, frequent opportunities to put in overtime hours rather than attend class, and fatigue at the end of the working day, over 75% of the women who were illiterate at the outset stuck through the program to its conclusion. Workers would not have been likely to spend an hour a day and four days a week for six months on learning to read, write, count, and copy unless they saw something very worthwhile coming out of the effort. In both theory and practice, literacy training seemed an appropriate initiative for the project.

The course began in June 1986 with 18 workers from Athletic Equipment. For reasons variously attributed to the general confusion of the time, the association of the project with communism, misunderstandings about what the project would provide (i.e., the notion that credit, eye care, health referrals, and so forth would be offered to participants in project courses), and other factors, four women dropped out within two months.

Reading, writing, and counting tests administered to the remaining 14 in August, September and October revealed that five were making "good" progress, four were making "fair" progress, and that the remaining five were not advancing in satisfactory fashion. The course was scheduled to end in December, but transportation strikes in November, coupled with Christmas vacation and extensive overtime work opportunities introduced delays--leading to a one-month extension of the course. Also, in order to provide the nine women making "fair" or "unsatisfactory" progress an opportunity to catch up to the rest of the group, supplementary lessons continued for another six weeks, and were in progress during the evaluation. An eight-week post-literacy course, essentially a period of practice and refinement of knowledge acquired in the basic program, is scheduled to begin in May.

Assuming that five of the nine women do indeed catch up before the start of post-literacy, the implication would be that 10 of the 18 trainees, or 56% of the initial cohort, achieved at least passable literacy with approximately 150 hours of instruction. Consultants I spoke with suggest that such indicators represent a high degree of training effectiveness.

One important contributor to this effectiveness has been the development of new training materials. With the help of consultants already experienced in literacy training, the project generated materials which made a closer link between sounds and symbols than would be found in other available texts. More important, it developed materials around urban subjects that trainees could identify with. This sound-symbol-subject relationship is apparently vital to training effectiveness. Appropriate materials did not exist prior to the project's initiative in developing them.

A second important contributor to effectiveness was the project's hiring of a highly qualified animator to take charge of the program. She was qualified both in terms of teaching experience, and in terms of cultivating productive interpersonal relationships with workers. Indeed, when the animator withdrew from the course in order to continue her studies, participants were upset about the change in personnel (although they adapted themselves to her replacement and continued their studies).

Also contributing to effectiveness was the project's contacts with other organizations. Contact with ETA, a private organization with considerable expertise in matters of literacy, provided capable technical assistance consultants to help in development of materials and in locating the animator I mentioned in the preceding paragraph. Contact with UNICEF yielded a gift of 60 literacy texts and a promise of a small grant to finance development of post-literacy texts. Contact with HAVA facilitated the project's establishment of a relationship with

ONPEP, which in turn yielded training for one literacy trainer and an invitation to a seminar on literacy for women. While each of these supportive actions was small, they were all important.

The apparent effectiveness of the course, however, does not imply that it escaped implementation difficulties. Such difficulties included varying levels of capability among trainees; stresses induced by their foregoing of overtime possibilities; insufficient attention to participatory learning (i.e., the course seemed too "academic"); absence of integration of the course with other project components (i.e., many trainees also wanted to be involved in the Core course); and difficulties encountered by project staff in coordinating and managing development and implementation of the course--a result of staff preoccupation with other project components. These difficulties do not seem to have compromised course outcomes, however, and what the project has at present is a tested capacity to provide literacy training to groups of 20 women at a time and at an implementation cost (i.e., leaving out development of materials and other "front-end" investments) which by my estimate ranges from $80 per participant with an animator paid $150 per month, to $120 with an animator paid $300. Adopting the mid-range figure of $100, and assuming that 60% of any starting group can achieve basic literacy in six months, the net cost per literate graduate would be about $165.

Staff believe that this net cost can be reduced through improvements leading to increases in effectiveness (i.e., raising basic literacy outcomes to a level higher than the current 56%). These improvements, tied directly to several of the difficulties I noted above, include: better initial screening of participants; reassignment of trainees to different classes according to learning speed early in the implementation process; improved scheduling to minimize conflicts with overtime possibilities; accepting only those workers who have gone through a Core course as an introduction to the literacy program; and more active management and coordination efforts.

While all those I interviewed believe that a major literacy campaign for factory workers is important, that it can prove effective, and that one should be implemented, there are three major impediments to such a program. First, with respect to the FWC, human and financial resources available under the current OEF grant from USAID are fully committed to other project components for the next 12 months. The FWC will be unable to continue literacy efforts beyond the post-literacy course I mentioned earlier without supplementary support. Second, other major organizations involved in literacy training, Mission Alpha being the dominant example, have also stretched their resources thinly to cover the country, leaving little available to shift towards the industrial zone. Third, although ADIH and many factory managers support the idea of having their workers become

literate, their method of calculating costs leads them to believe that the cost, if they had to pay it, would prove onerous. By their calculation, the $100 cost per worker represents an additional outlay of about $17 per month, or a 23% increase over the $75 per month salary of a typical worker. This type of estimation (as contrasted with a more appropriate approach that I outline below) yields a reluctance on the part of interested managers to foot the bill for literacy, and therefore to support the FWC, Mission Alpha, or any other organization to carry out a campaign.

Against this background of experience and current constraints, staff have decided that their primary focus in the immediate should be to document the need for and the accomplishments of the literacy course, and to use the documentation as a basis for seeking financing to support a larger-scale and longer-term literacy training effort. (This task is already underway and should be complete by the end of April.) Note should be taken that the FWC's role in a literacy program, if it retains any direct role, will be one of coordination. That is, if the program receives funding, it will hire a coordinator to supervise trainers, and a technical consultant to evaluate student progress. Current staff will supervise but not be directly involved in the effort. Alternatively, but having the same effect, funding for the program may be passed on through a sub-contracting arrangement to a competent organization like Mission Alpha. I concur with this strategy, and my two recommendations with respect to literacy constitute only minor refinements to the strategy already developed by staff.

Recommendations

1. The documentation package being developed by the project in support of funding proposals should be relatively comprehensive, and should include:

- a background section that highlights the overall situation of adult literacy in Haiti (from the 1982 Census and related materials), the situation of literacy among factory workers (from the baseline survey), the economic situation of workers (to dispel the impression of their being "middle income"), a review of basic arguments supporting literacy efforts from international documents--including a treatment of how literacy might conceivably increase worker output and therefore income (for those paid on piecework, for example), and an overview of current adult literacy efforts in Haiti (to emphasize the scarcity of current funds and organizations dedicated to this purpose);

- a historical section that systematizes the experience of the literacy course (and later, the post-literacy course), outlining the characteristics of materials and approaches used, difficulties encountered, outcomes in terms of literacy gains and costs, and lessons learned that have been incorporated into the proposed program; and

- a program design section that sets forth the materials and approaches to be adopted, facilities to be used, method of training trainers, management factors, institutional relationships, proposed costs, and target outcomes.

2. In seeking additional support, the project should spare no effort in trying to convince factory owners and managers of the desirability of their financing all or a significant portion of the costs of literacy training for their workers. Their cooperation would in any event be essential in order to obtain adequate classroom space, and in order to allow women to attend class without fear of retribution for not working overtime. But the basic argument, keeping in mind that the cost of training 10,000 workers in the industrial zone is of the order of $1 million, is that such efficiency, labor relations, or other improvements as literacy could provide would be captured by each firm. And it would not be as costly as some managers might believe. One may, for example, imagine a sports-related factory employing 1200 workers, of which 600 are illiterate. If 400 were interested in training, and if such training were provided over a two-year span (i.e., five classes of 20 trainees each every six months) at a cost of $100 per trainee, the factory's outlay would amount to $20,000 per year. At a worker salary of $75 per month, the factory's wage bill would amount to $1.1 million annually. The effect of training on the wage bill is therefore an increase of less than 2% in each year. In cultivating interest from ADIH and individual firms, this type of approach to costs should play a dominant role.

f. Vocational Training

The CA envisaged the possibility of introducing vocational training programs, here understood as training in specific skills associated with particular occupations (within factories or outside), if workers expressed desires to obtain such training, and if factory managers viewed such an effort as worthwhile. In the event, except for peripheral suggestions like the possibility of having the FWC instruct women in the use of factory toilets, factories were not supportive of training. Indeed, some noted that prior training was counterproductive. In textiles, for example, such training seemed to impede workers in their learning of factory techniques.

Many women without formal training did express interest in learning dressmaking, embroidery, and pastry making and other basic skills already offered by the many domestic education centers in the country, but because so many other workers had such skills and were still obliged to earn their livelihoods in factories, and because such training was readily available in neighborhood domestic training centers, project staff believed it inappropriate to respond with a program. Possibilities for introducing vocational training in other skill areas such as soldering, welding, electrical repairs, and similar items which some women suggested during one meeting I had with them, were also discussed and then dropped. Factors mitigating against training in these skills were that they were male-dominated (meaning that women would find difficulty in marketing the skills in a near term), that schools and informal apprenticeship programs offering the skills were readily available in various neighborhoods, that project staff were already overloaded with other project components and, most importantly, that in Haiti there is very little direct correspondence between formal occupational training and subsequent employment possibilities. The labor market, notwithstanding perpetual complaints of scarcity by factories, is saturated with graduates of all manner of vocational schools.

Appreciation of this last factor is growing steadily in the development community. The INFP, for example, is struggling to define the meaning of vocational training within the context of the World Bank's fourth education project. At present it is studying the vocational training capacity of existing systems, the training needs of the informal sector, and possibilities for "promoting women" through informal sector training and on-site factory training. Notwithstanding these explorations, the INFP remains at something of a loss as to how to proceed. When I spoke with the director, he even suggested that a useful function of the FWC would be to help the INFP by extracting ideas from its ongoing dialogue with factory women. The INFP's dilemma, shared by many other training institutions, suggests that the FWC project's decision not to proceed with vocational training is sound.

As I see it, however, the difficulty does not lie with vocational training in general, but rather with the conceptualization of pertinent "vocations," the skills attendant to them, and the relationship between skills and income. Definitions of occupations and skills used for training purposes in Haiti, be it embroidery or welding, are divorced from the daily realities of household circumstances, especially from the circumstances of poorer families. Over the course of time a woman is more or less frequently called upon to be a cook, a house repairer, a doctor/nurse, and many more things besides. To the extent that a lowering of cash outlays has the same effect on income as an equal increase in cash earnings, acquisition of

skills that lower the costs of cooking, repairs, or medical care may have important economic consequences, especially in poor households where cash expenditures are much less preferable than expenditures of additional time. It is perhaps for these reasons, when I pressed them for ideas about potentially useful "life" skills, that factory women suggested that training in how to repair a house (obviating the need to call in a worker or to seek new accommodations), and in first aid (lowering the need for several types of medical services) might prove helpful. Similarly, they showed some interest when I mentioned that a new type of heater, combined with some training in how to use it, could reduce charcoal and fuelwood requirements for cooking by perhaps 30%.

Whether these particular "vocational" training suggestions are the most salient, I cannot say. But the idea remains that there may be some skill areas, even though falling outside the normal purview of the field, that many women may find particularly useful. A project like the FWC, by its intimate contact with factory women, offers a unique opportunity to identify several of these skills, to work with women in prioritizing them, and to develop training programs for them. This type of effort may be helpful for the project, and may also prove helpful to other agencies involved in training (e.g., perhaps pointing to a reform of curricula in the several hundred domestic education centers of Haiti). In this context I offered up five recommendations to staff, who agreed to pursue them further.

Recommendations

1. Staff should initiate an explicit ongoing dialogue with factory women for the purpose of identifying areas of daily or other recurrent activity where additional knowledge or skill might yield substantial economic benefits for individual households. These may include such things as house repair, first aid, and instruction in the use of money-saving technology. Whatever the composition of the list of potential skills, staff should also undertake to prioritize them, perhaps by means of a consumer preference survey among factory workers, in order to assure that there is indeed a demand for particular skills, and in order to focus staff and financial resources in those areas where interest seems highest.

2. As priorities clarify themselves, staff should develop an inventory of local resources available to provide, or to assist in the provision of training programs, and to estimate costs of acquiring the resources. For example, a school like St. Jean Bosco may be able to offer low-cost instruction in house repair. The Ministry of Health, or perhaps a PVO in the health sector, may prove helpful in first aid. As regards the cooking technology, MEDA is apparently about to construct and test new

equipment, and may be willing to eventually offer training. But whatever the form of resources, the FWC should strive to minimize use of its own staff for training purposes, leaving that activity to trainers already formed by the project (or by cooperating institutions).

3. As resources permit, staff should initiate pilot training sessions for highest priority skill areas. In general, these sessions should take the form of three-week focus sessions, as is planned for legal and certain health issues in the second half of the fourth Core course, following a three-week Core introduction of the type I recommended earlier in subsection a. That is, the approach to vocational training should not involve a course offering separate from other educational efforts. Rather, subjects should be made part of the general resource file (see Training Materials, below) in a section perhaps called vocational or domestic training, with each subject becoming a distinct topical chapter within the section.

4. As is done for other training components, the pilot effort(s) should be fully documented and evaluated. If the experience offers tangible evidence that this kind of approach to vocational education is worthwhile, staff should compile the evidence and then develop and circulate funding proposals on the basis of it to interested organizations.

5. The documentation developed for funding purposes should also be circulated to public and private organizations currently engaged in, and often struggling to define appropriate approaches to, vocational education. They might find some of it helpful to their ongoing efforts.

g. Training Materials

Other than such issues as missing elements, like coverage of AIDS disease in the health course, and my reservations about the micro-enterprise course, nothing I have seen in the training materials causes me to believe that they are inappropriate for the purposes they serve. This is not to suggest that the materials are necessarily ideal, but in an approach to training which places primary emphasis on participation and discussion, the independent characteristics of written materials cannot readily be judged as either appropriate or inappropriate. Moreover, the materials are in a constant process of change. Each new bit of material introduced into a course proves its worth or worthlessness in concrete terms. What is good remains for the next course. What is not good is dropped or modified. So what I am able to say with some conviction is that the process of adapting and re-adapting materials on the basis of experience with them is fully appropriate.

Where I and several staff members and consultants I spoke with deduced a difficulty was in the overall approach which the project adopted towards organization of materials. This approach developed materials as if they were components of "manuals" (e.g., as if they were Creolized versions of OEF documents). The difficulty lay in the inconsistency between a manual, assumed to be the final product of a long period of experimentation, and the staff's constant efforts at adding, dropping, or modifying various components of the manual in the light of experience and for different audiences. This was especially the case for the Core and health courses.

An alternative approach involves the development of a training resource file in which there would be major sections for Core material, health topics, legal topics, micro-enterprise issues, vocational training, etc., and within each a set of subsections or chapters on different topics associated with the section. With this kind of resource file different types of courses of varying duration could be assembled rather quickly to meet the demands of particular groups of workers, and also the requests of other organizations that might have interests in providing similar kinds of training for their own beneficiary populations (e.g., Foster Parents Plan, Christian Children's Fund). Moreover, the resource file approach lends itself to constant addition of new topical chapters, removal of old ones, and modification of current ones without requiring major overhauls of manuals.

Staff and I agreed that such an approach was more consistent with what they were doing in general, more appropriate for purposes of expanding the number and variety of subjects to be covered in future courses having the Core introduction I outlined earlier, more consistent with the kinds of expansions I have recommended for the health course, and more likely to prove of eventual interest to other organizations.

Because the project has already moved towards the resource file approach (without saying it explicitly), I do not see a purpose in making a recommendation for a process already in motion. I mention the matter for the record, and also to suggest that I see no immediate prospects for sale of the materials to other projects. The resource file must be further expanded, tested, and then shared initially at no charge with other interested institutions. If such free samples find a market, the project may consider charging a fee for the materials later on.

III. PARTICIPATION

The level of participation to date of workers, factories and other institutions, noted where appropriate in the preceding section, is consistent with the rough targets set down in the CA for the project's early stage of implementation.

As far as workers are concerned, there does not seem to be any difficulty in cultivating substantial interest and participation in regular and ad hoc programs. Dropout rates, given the volatile circumstances of 1986, early misunderstandings about the nature of the project, and the rate of layoffs and dismissals, are well within the bounds of acceptability. More important, as the project has "settled in," and as its purposes have become clearer to workers, demand by the workers for more and/or a greater variety of program offerings seems to have grown. The motivations underlying this demand are uncertain, with my respondents suggesting all manner of more or less plausible possibilities. These include: the opportunity for a refreshment, a social distraction before returning home, a rare status-related opportunity to chit-chat with members of the bourgeoisie, thirst for any kind of new knowledge, specific interests in what it is that particular programs offer, and a general interest in having an association with the FWC. Whatever the actual combination of these or other reasons might be, the fact remains that workers show up regularly, and that new participants only require invitations before presenting themselves to the FWC.

With respect to this last, one issue that came up in discussions with staff was the method of invitation. Until now most participants were selected for invitation by factory managers at the request of the FWC. Staff, and to some extent the workers when they had to explain to colleagues why they and not the colleagues had been chosen, were uncomfortable with this arrangement. Ideally the project's link with workers should be direct, women to women as it were. Discomfort resulted from a sense that workers might perceive the FWC as operating for factories, and that selection criteria used by managers might not be appropriate. Given the substantial number of participants that the project can now communicate with directly in several factories, the need for intermediation by managers in those factories is no longer as evident. Indeed, given the several types of positive impacts that seem to have flowed from participation, as described in Annex 4, asking prior and current participants to seek out and invite other workers appears as a potential impact well worth cultivating.

Within the framework of the "helping women help themselves" philosophy of the project, staff and I addressed what we all believe is a more significant issue in the relationship between

institutions having only a vague understanding of what the project was about. This is normal in the early phases of a project when attention focuses primarily on putting the effort on its feet. As the project develops and distributes documentation about its programs and proposals for funding, it should enlighten other institutions and in the process bring more of them into closer involvement with the project.

Out of this review of participation, I have four recommendations:

Recommendations

1. Whenever feasible in factories with workers already participating in FWC programs, the project should make arrangements with management whereby past and present participants are allowed to select and invite new participants. In general, factory permission should not be necessary in a project of this type, but to protect new participants from penalties that may result from their choosing not to work overtime, factory cooperation may be essential.

2. Project staff should intensify their ongoing efforts to seek out appropriate ways and means of accelerating the process whereby workers gradually become more closely integrated into the project. Such methods may include: expansion of more informal activities like conferences, roundtable discussions, theatrical presentations, and films suggested during the staff retreat of January 1987; early implementation of other staff ideas like working with "soldes" to which workers belong or having workers join with staff in publishing a newsletter; role reversal exercises I noted in recommendation 3 of Section IIa; visits by staff to worker homes and vice versa; and so on. Whatever combinations of approaches staff may choose, a very definite component should be continuance of the staff's ongoing efforts to recruit and train workers to serve as monitors/animators in FWC programs, to gradually elevate some of the monitors/animators to full decision-making status as FWC staff members, and to select others for training as leaders on factory floors and residential neighborhoods.

3. The project should refrain from trying to maximize coverage of factories in the area. Rather, it should pursue a strategy of increasing the share of participants drawn from individual factories already associated with the FWC, while at the same time gradually adding a few more factories as time, resources, and opportunity permit. In this last regard, a useful approach might envisage incorporation of factories connected to members of the project's Advisory Committee (e.g., GTE, JEBSA).

4. As an extension of the foregoing recommendation, I urge the project to explore the possibility of one or more joint activities with the Management Productivity Center. The Center is presently providing training to factory supervisors. An effort to put workers and supervisors (preferably from different factories) together in the same room with trainers may yield useful outcomes in terms of encouraging workers to take a more active stance in voicing their concerns to supervisors, and in perhaps highlighting the utility of the FWC to factories.

IV. RESEARCH AND EVALUATION

Research and evaluation activities identified in the CA were to include: baseline studies of the worker population; monitoring of progress of the project and its programs; an analysis of the productivity impacts of programs; and feasibility studies for new programs. To date, the project has completed one baseline study, has monitored all its programs, and has attempted to collect information on productivity impacts.

The baseline study, which began with data collection under very difficult conditions in June-July 1986, holds promise of becoming a significant contribution to understanding of the socioeconomic circumstances of women in the city. In general, the development community in Haiti, as elsewhere, can be counted on to complain about scarcity of quantitative data, and at the same time to make no serious effort to produce desirable data. In this context USAID and OEF are to be commended for incorporating the baseline study into the project as a means not only of providing information of direct use to the project, but also of adding important material to the limited storehouse of quantitative knowledge available to the greater community.

For the community at large I think that different audiences will find the data highly informative. The distribution of income shown in Annex 5, for example, will be helpful to those who at present must make heroic assumptions about the distribution for programs and project purposes (e.g., affordability of housing finance designs by the BCI). It should also serve to dispel any lingering myths about factory workers constituting something of a middle-income group in the city. More narrowly, data on the relationship between years of schooling, age, and literacy can be helpful for educational projects. Parallel data on health, fertility, expenditures, credit, and so forth will all find ready audiences.

For the project itself, the baseline data allow staff to put FWC activities into proper empirical perspective. In such projects it is too easy to lose sight of the broader context within which the FWC functions. Early on, for example, the project made much of the idea of referring workers to health and

other service providers. As long as the number of women to be referred was small, the idea remained congenial. But the baseline study suggests that on any given day there may be several hundred candidates for such referrals, a number far exceeding the capacity of service institutions. Or, looking at this same observation positively, the study highlights the potential importance of increased efforts in health-related matters as a means of raising income and productivity. Similarly, it pinpointed the scale of illiteracy in the population and the potential demand for literacy programs. The study also seems to undermine arguments stressing the need for family planning. In all these ways the study has permitted staff programmatic ideas to be set against a statistical context wherein the rationale for the ideas could be examined carefully. I think this capacity for testing is very helpful.

I can say all these things with conviction because I have seen the data. The problem at the moment is that few outside the project have seen them. I do not know whether the period of delay between the end of data collection and the beginning of data diffusion should be considered abnormally long in the particular circumstances of Haiti and the project, but during the evaluation I noticed three factors that seemed to have impeded progress in this area. First was the Research Coordinator's lack of extensive training and experience in the advanced skills required to perform statistical and analytical cleaning of the data (i.e., searching for and eliminating dubious cells and cases), to perform general analyses of a matrix containing 265 cases with 283 raw entries each, and to conduct more specific analysis of submatrices covering a dozen different subject areas --each demanding highly specialized substantive expertise (e.g., for income and expenditure analysis, housing, nutrition, health, etc.). This is not to suggest that the Research Coordinator, a psychologist, is in any way at fault. Indeed, I think she did a spendid job in managing the baseline data collection effort. Moreover, I find it hard to imagine how the project could have found someone with all the noted skills in Haiti, or in the U.S., for that matter. Rather, the difficulty presented by her lack of prior exposure to the skills was the unavoidable need to allow time for her to acquire certain proficiencies on the job.

To the extent that other members of the staff and OEF personnel did not have all the requisite skills either, the second and complicating factor was the absence of individuals who could assist and thereby train the Research Coordinator, and more to the point, who could even identify what skills were necessary. For example, while I think I provided useful guidance on survey design and implementation during my first visit to the project in early 1986, I did not serve as well during the second visit at the end of the year. At the time, after noting that the project was overly dependent on the outside consulting services of statisticians who understood a great deal about statistics but

considerably less about the specific kinds of analytical questions which need to be asked or about the particular methods required to answer them, I recommended that the Research Coordinator receive training in the SPSS package of statistical analysis programs from the statisticians--which she promptly began to do. Unfortunately, I failed to specify which SPSS program was most salient. And with the statisticians also unable to identify more or less relevant programs, training spread over a much broader range of matters than actually required for project purposes.

The third factor, a variation of the second, was that in the absence of anyone in the project with adequate knowledge of what was required for analysis purposes, the Research Coordinator came under pressure from her colleagues to produce analyses and reports that neither she nor her colleagues could be expected to produce without substantial help from outside. But because staff could not specify what kinds of help were appropriate, such analytical assistance as was received (e.g., from the statisticians) could not be assessed in terms of its relevance to project purposes. In the event, the statisticians supplied vast numbers of tables that were sometimes of little practical value and at other times of considerable value but that staff could not recognize as such (less the fault of the statisticians and more the problem of no one on staff able to specify with precision what was wanted of them), which put even more pressure on the Research Coordinator to do "something" with them. The result was a build-up of stress within the project that may have slowed down such progress as could have been made with the skills that staff, including the Research Coordinator, already possessed.

The project was therefore caught up in what I think of as a circle of misunderstanding that only served to waste a good deal of time, energy, and resources. I discussed this issue at considerable length with the Project Director, the Research Coordinator, and the OEF staff, and believe that notwithstanding ongoing disagreements among us concerning causes and responsibilities for delays, we came to a shared understanding of how to proceed in the coming months.

The situation at present is that the project has a raw data set in hand which requires a bit more fieldwork and recalculation of certain variables to complete properly. Somewhere along the line there will be a need for statistical and analytical cleaning of the complete set, but in the interim it should do well enough for preliminary analysis purposes. Following up on my suggestion, the Research Coordinator will soon have mastered a particular SPSS program which provides a simple method of analyzing tabular categories (i.e., "breakdown"). The project does not need more sophistication than that for purposes of extracting information from the data. More specialized knowledge is required for purposes of preparing working papers on

various subjects. The Research Coordinator might be able to do one or two such papers, but the bulk of them will have to be done by other staff in their various areas of expertise, and perhaps more often by consultants brought in for specific analytical tasks. This is the approach staff and I agreed upon as the means to produce quality documents that can prove of interest to other agencies.

In this context I might mention that once the data set is completed properly, I see no reason why the project should not make it available to other organizations--at a reasonable price to cover costs of computer diskettes and labor time for duplication. For several such organizations the analyses produced by the FWC may be much less important than the raw data themselves. Analytical questions posed by FWC staff and consultants may not be the questions posed by other agencies. They might as well have the data, and in an environment with an insatiable thirst for numbers, the project will benefit from the added reputation of having produced something useful and important for the community at large.

With respect to monitoring and evaluation of programs, the project has developed a number of distinct instruments for different purposes. There is, for example, an autoevaluation. This is a "process" evaluation done by monitors after each session of a course. It helps them to think through and identify issues in a structured manner, to use lessons learned in one session for the next one, and to do the same from one course to the next.

Allied with this is an informal participant characteristics survey. Originally implemented with a formal questionnaire, the survey is now done informally by monitors. It collects information similar to that in the general baseline survey, as a means of establishing a baseline upon which to assess future impacts on a group of program participants. This information, together with syntheses of the autoevaluation, are then transferred to a "global" evaluation form which provides a summary of what happened in a course, and of the characteristics of participants in that course.

Aside from examinations used to monitor progress in the literacy course, the only other instrument of note is an entrepreneur evaluation. This questionnaire, sent by mail or hand delivered to factories, solicits reactions from managers and supervisors concerning the impacts of FWC programs that they may have noticed upon workers.

In discussions with the Research Coordinator about these instruments I came to the conclusion that some simplification of the monitoring and evaluation process is in order. For example, I see no purpose in having the Research Coordinator deal with the

autoevaluations. These are in the nature of structured diaries which serve the primary purpose of maintaining a record of daily program activities for monitors. As such, the monitors might just as well retain the forms and, at the end of a program, synthesize the experience as a final report. Sooner or later these reports can be referred to as the need arises, e.g., for purposes of documenting a funding proposal. The Project Director or Training Coordinator, rather than the Research Coordinator, should assure that the forms and reports are completed in a timely manner.

As regards the "global" evaluation form and the informal methods used to collect baseline data for it, I do not see the evaluative purpose it serves. Parallel data for a "control group" are not being collected. Without a control group, not to mention the difficulty of following up on participants months after they've left a program, a before-after impact evaluation is impossible. This evaluation form is in fact nothing more than a smaller version of the general baseline survey. I think it a good idea to carry out baseline surveys with participants because the data may be more reliable than interviews with complete strangers. But this has little to do with impact assessment. I'd drop it altogether and replace it with a proper baseline study of all current and past participants next year.

The entrepreneur evaluation, understood as an opinion survey, is fine. However, I do suggest that it be filled out during the course of a face-to-face interview. The number of respondents is quite small, so an interview would not be burdensome.

Out of this review it should be clear that the project is doing little to systematically document the impact of its programs on workers. Indeed, when I asked staff to tell me what they saw as signs of positive or negative impact, they told me stories. The problem was not the stories, but the absence of any attempt to write them down in the form of a record. When I asked them to record the stories, they collectively produced Annex 4. Impact assessments of a scientific type are extraordinarily difficult under the best of circumstances, and virtually impossible for projects like the FWC where one cannot predict in advance the form that impacts are supposed to take. Measuring progress in literacy is one thing. Deducing the impact of a Core course is quite another. In this open-ended circumstance stories are vital. Staff should make conscious and deliberate attempts to uncover and record such stories all the time, and the Research Coordinator should be assigned the task of collecting and classifying them in some sort of coherent way.

All of this is to suggest that there is too much paperwork of doubtful value in monitoring and evaluation activities. The scope and scale of effort involved can be streamlined very substantially.

On the more narrowly defined matter of assessing the impact of FWC activities on job performance, "productivity" to be specific, I must note at the outset that such an assessment is technically impossible on the basis of worker-related data alone. Productivity, technical or economic, is a function of several factors operating simultaneously. What one can look for is change in volume of output (e.g, baseballs per hour) assuming no changes in other factors like factory layout, machinery, and tools, etc.

This nuance did not seem apparent to project staff, nor the need to have a control group against which to compare the output of FWC participants. An effort to collect data from worker files in factories did not yield useful results. I therefore worked with the Research Coordinator to outline one type of relatively simple study that, if implemented, might be able to indicate whether FWC programs have measurable effects on output. An outline of what is required is included among the eight recommendations that follow.

Recommendations

1. A top priority for the project should be completion of the baseline study. This will involve:

   a. after a pretest with 20-30 respondents, a small survey of 40-50 workers aimed at clarifying data collected for questions 33 and 34 of the original study;

   b. modification of data in the original study derived from questions 33 and 34;

   c. reconstruction of the formula used to calculate interest rates for credit, and revision of the data in the baseline set;

   d. by hand and for every case, a check on whether data entered for questions on income and expenditure are in gourdes or dollars; and

   e. if possible, securing qualified technical assistance to "clean" the data in both statistical and analytical terms.

2. Consideration should be given to conducting a second baseline survey towards January. Notwithstanding sampling errors that might occur, or the lack of adequate coverage of factories, the survey can produce useful results even if restricted to a population of past and present participants in the FWC. By January there should be some 200 workers who have had substantive contact with the project. The primary objective of the exercise

would be to obtain an update on certain of the data collected in 1986 and, with the benefit of experience, a more accurate data base.

3. However crude and error prone the baseline data may be until completion of tasks I note in Recommendation 1, a parallel top priority should be the extraction and analysis of data on specific topics deemed important by project staff. To this end I suggest a strategy wherein:

a. the Research Coordinator completes her training in SPSS subprogram "breakdown" and thereafter concentrates her time for baseline analysis largely or exclusively on fulfilling requests for descriptive and analytical tables (because her time will be largely taken up with data collection and other related tasks);

b. the project seeks technical consultants to prepare working papers on those topics deemed important by staff but which require analytical qualifications that staff do not possess;

c. the project distributes draft working papers produced by staff and consultants to outside individuals and organizations for review, comments, and suggestions; and

d. the project invites such outside individuals to join with staff in developing analyses and papers of mutual interest.

4. Upon completion of recommendation 1, the project will have developed a data set capable of keeping a substantial number of researchers occupied for years. Retaining the data within the FWC will thus serve little useful purpose. The project should therefore consider marketing the raw data (they fit on five diskettes) together with a short manual listing variable codes, names, and their file locations. A price of the order of $25, covering the costs of diskettes and their preparation, should be low enough to attract anyone who might be interested in obtaining the material.

5. Responsibility for the autoevaluations should be left entirely to the monitors who prepare them in the first instance, with the Project Director or Training Coordinator assuring that they are done in a timely and appropriate manner.

6. The "global" evaluation should be abandoned. In its place all staff should be required, once every month or so to track down different ex-participants in search of stories and anecdotes that might conceivably suggest a program impact. Whether the stories can in fact be linked directly to the FWC is unknown, but an effort to record them will provide data which if

nothing else serve as baselines for the types of impacts the FWC might look for or expect in the future. In any event, the final evaluation of the project will need them.

7. The entrepreneur survey should always be carried out face-to-face with managers and supervisors.

8. If the FWC and USAID still deem it essential to examine the project's impact on job performance, the examination should restrict itself to assessing impact on product output, perhaps along the following lines:

a. 40 to 50 workers, all paid by the piece and performing exactly the same task in each of one to three factories, are selected for the study;

b. half the selected workers in each factory will represent a control group, the rest will participate as the experimental group in an appropriate FWC program;

c. one week before the program starts, and then again a week and six weeks after it ends, the study collects data on the number of pieces, and the corresponding number of 7.5-hour days worked during the week;

d. during the first week (i.e., before the program begins), the study collects baseline data from all workers concerning number of years (or months) worked in that factory, age, level of educational attainment, number of regular and overtime hours worked during the week, and the number of hours calculated for a regular day for that worker and factory.

The central thrust of this exercise would be to see whether there are measurable differences in output between the two worker groups in each factory. Because any such differences are likely to be small, and because the sample size is also small, the study will be highly sensitive to the accuracy of collected information. As a result, the project must obtain complete and willing cooperation from factory managers and supervisors who will be required to provide the data. If such cooperation is not forthcoming, the study should not proceed.

V. IMPLEMENTATION PLAN

Notwithstanding interruptions associated with recurrent upheavals in the city and in the project (e.g., the communism and CIA episodes, staff departures and illnesses, etc.), implementation of project activities is moving ahead more or less

on schedule. The only important area warranting concerted effort to speed up is completion of the baseline study and the preparation and diffusion of working papers derived from it.

The timetable of activities nevertheless requires a complete revision in light of the changes that have taken place in the composition of programs, of the need to structure further activities around a strategic plan for long-term survival and institutionalization of the FWC (see Section 8), and of budgetary constraints (see Section 9). I discussed this matter at length with the Project Director, and we agreed in principle on the following adjustments to the August 1986-July 1987 Calendar of Activities:

a. Rescheduling of FWC Activities (Year 3)
   - move from July 1987 to May 1987

b. Construction of FWC Building
   - eliminate timeline

c. Staff Retreat for Internal Evaluation
   - move from July 1987 to May 1987
   - show it as second phase of process that began in January 1987

d. Advisory Committee Regular Meetings
   - show first meeting in March 1987
   - show one meeting every three months

e. Advisory Committee, Sub-Committee Meetings
   - add new line, with meetings every month or two

f. Design of Health Education Programs
   - show as ongoing activity beyond January 1987

g. Partial Reports on Beneficiary Job Performance
   - split into entrepreneur survey reports, scheduled as appropriate, and output study

h. Report of Baseline Survey, Pass 1
   - rewrite as "preparation and diffusion of working papers," a continuous activity beginning in May 1987

i. Preparation of Baseline Survey, Pass 2
   - move from March 1987 to Nov./Dec. 1987

j. Baseline Survey Second Pass (i.e., of ex-participants)
   - move from April 1987 to January 1988

k. Data Collation for Baseline Survey, Pass 2
   - move to February/March 1988

l. Report of Baseline Survey, Pass 2
   - rewrite as in point h, above, and show as continuous activity from April 1988 onwards

m. Start FWC Prenatal/Family Planning Program
   - eliminate line for time being

n. Start FWC/CND Health Program
   - eliminate line for time being

o. Establish FWC Documentation Center
   - show as permanent, ongoing activity

p. Literacy Courses
   - revise line as "preparation and diffusion of funding proposals"

q. Vocational Training Course
   - revise line in short term as "analysis of vocational requirements"

The foregoing constitute changes to lines that already exist in the Calendar of Activities. The Director and I also agreed that new lines are required for such things as development of supplementary training materials (e.g., nutrition, first aid, legal rights, occupational health, etc.). Most important will be elaboration of an integrated timetable for implementation of different courses over the coming months. This will be helpful in scheduling specific training of monitors for the various courses, of assessing the feasible number of courses of each type that may be offered, and of revealing the total number of workers that may be able to benefit from training. These scheduling activities are already underway, and an explicit recommendation that they be done is therefore unnecessary.

VI. PROJECT STAFFING[1]

Project staffing is presently more than adequate for FWC needs, and the qualifications of each member of the staff with respect to her assigned tasks is also adequate. Their collective performance nevertheless seems constrained by two difficulties. The first is that tasks do not always look like they are

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[1]The terms of reference (Annex 2) for this Section ask certain questions that are more in the line of general management issues. I therefore address them in Section IX.

allocated in the most efficient fashion. For example, I do not understand why the micro-enterprise course requires direct involvement by two individuals of the staff. One staff member accompanied by a monitor who would take over the second iteration of the course seems sufficient to me for both short- and long-term purposes. Similarly, as I discussed in Section IV, having the Research Coordinator responsible for the diaries or autoevaluations of other staff seems a duplication of energy. Assigning the Research Coordinator the task of writing research reports on topics where other members of the staff have greater expertise also strikes me as inefficient. These examples seem to reflect a tendency to assign work to individuals without adequate attention to efficient human resource use, or of their relative strengths and weaknesses with respect to particular tasks at hand. More care to this matter is warranted.

The second problem is lack of substantial effort to date in developing a cadre of monitors to take over many of the training tasks which staff have performed since inception of the FWC. This is not to suggest that the project should have done more by now. Initial development and testing of course materials and procedures required direct staff involvement. For the remainder of the project, however, there must be a concerted effort to train monitors and to put them in charge of courses. This will liberate staff time for coordination and for many other important tasks that need doing in coming months.

A point of clarification in this respect is that staff and I seemed to disagree on the meaning "substantial effort." For staff, the one-week training course for monitors (which I visited) in March 1987 constituted a substantial effort. I do not doubt for a moment that staff invested very considerable time and energy in organizing the course. But for me such a course represents only the orientation phase to a training process of much longer duration. The essence of training for monitors, for staff, or for any teacher evolves through on-the-job experience, preferably with guidance and supervision from someone (e.g., a staff person) who already has the experience. This approach underlines my earlier notation that it would have seemed more appropriate to have one staff member and one monitor in the micro-enterprise course rather than two staff people and no monitors. So what seems in need of doing is development of an explicit strategy of training that identifies not only one-week orientation courses, but also a schedule of core, health, micro-enterprise, and other courses that shows, for the near term, which members of the staff would supervise how many monitors while the latter get their first experiences, and for the longer term that shows how many monitors would be implementing courses on their own (and/or training additional monitors in the process).

Because staff know the qualifications and capabilities of monitors better than I, because they also know better than I the kinds of training such monitors might require, and because a visitor may easily misjudge the matter of efficient use of staff resources, I feel compelled to refrain from making explicit recommendations on the foregoing matters. Rather, I urge the project to give the issues I have raised serious attention, and to raise them for discussion at some point in a seminar/retreat that I propose as recommendation 2 in Section IX, below.

VII. ADVISORY COMMITTEE

The project's Advisory Committee, which met for the first time during my visit, contains 15 members representing several sectors and institutions of importance to the FWC, as follows:

Government - Mr. Jean-Robert Vaval (Ministry of Social Affairs)
Education - Ms. Monique Clesca (UNICEF)
Ms. Claudette Werleigh (CARITAS)
Ms. Denise Fouchard (HAVA)
Mr. Charles Tardieu (CDRH)

Housing - Mr. Charles Clermont (BCI)

Health - Dr. Ary Bordes (Ministry of Public Health)
Dr. Ronald Mercelon (Fondation Pedodontique)

Industry - Ms. Chantal Lamarre (ADIH)
Ms. Nancy Duvivier (GTE)
Mr. Michel Liautand (JEBSA)
Mr. Lesly Nazaire (Wilson)
Ms. Katheline Apaid

Law - Ms. Chantal Ewald

Micro-Ent - Ms. Jocelyne Fethiere (FHAF)

This combination of individuals fully responds to the purposes for which a Committee was included in the CA. It can: advise and assist on several technical areas of the project; in the development and review of training matters; and in spreading information about and opening productive doors to the FWC--including doors to funding. Whenever the FWC institutionalizes itself, the group will constitute an excellent Board of Directors.

This reaction flows from my attendance of the first meeting, where I was uniformly impressed by every individual in attendance, particularly with respect to their immediate willingness to volunteer their time and connections to help the

project move along more efficiently. Among the suggestions that came forward in this last regard was establishment of subcommittees with which project staff could work more closely and more informally as required. The notion of a formal "subcommittee" doesn't work too well with a small Committee, but the important aspect was the willingness of subgroups to work with staff in areas of particular competence and interest. Out of this meeting I have two recommendations.

Recommendations

1. All documentation produced by the project for general diffusion should be forwarded immediately to every member of the Advisory Committee for information, review, and comment.

2. Between formal meetings of the Advisory Committee, the project should make every effort to seek counsel from individual Committee members whenever the competence, interests, or connections of those members appear appropriate for the matter at hand. In effect, the FWC should regard Committee members as approximately equivalent to senior project staff, and to integrate them as fully as feasible in ongoing project activities. An "involved" Committee is generally more helpful than a passive review Committee.

VIII. INSTITUTIONALIZATION

The Government of Haiti approved OEF's efforts to establish itself as an NGO last October. The project has, with legal advice, explored the requirements for having the FWC become an independent NGO. The process involves transforming the FWC into a legal "foundation" for a year, after which it may transform itself again into a legal NGO. Efforts to begin the legal paperwork necessary for the transformation have not yet begun, and the Director and I agreed that the efforts should start as soon as possible.

Legal institutionalization is important, but it is not as important in the immediate as the need to increase project efforts at raising funds to carry the project beyond the date when the current USAID-OEF cooperative agreement runs out of resources. Working together with OEF staff, the project has found some outside support, including: $5500 from PACT for a food vendors study; $2500 from Citibank; $5000 promised from the Canadian Embassy; $10,000 from PROFAMIL's USAID project; $5000 from the Hewlett Foundation; and an Eastern Airlines ticket. Unfortunately, against this accumulation of some $28,000 in actual or promised support, the fact remains that the FWC is spending about $13,000 per month (excluding OEF overhead) in its current operations. The need for a more concerted effort at raising funds was evident to all members of the staff.

After some discussion of how to proceed, staff and I came to what I believe is a broad understanding that all major activities for the next year should contain implicit or explicit components that gear themselves to seeking support. For example, selection of topics to be extracted from the baseline study and synthesized as working papers should be prioritized with respect to their utility as background information in funding proposals. Thus analyses of income distribution of the type shown in Annex 5 are important in emphasizing that the target population is largely quite poor. Similarly, papers about education and literacy, health, or contraceptive use serve as critical background to proposals in these sectors.

More important perhaps, clear documentation of what the project has accomplished with Core, health, and literacy courses, both in terms of the process of training and in terms of the impact (e.g., material like that in Annex 4), can reveal to prospective funders that the FWC is an experienced operational entity that yields noteworthy results. Along these lines the project can also present itself as a competent research entity. Through its contacts with several hundred factory women who will have participated in FWC programs by next year, and through its demonstrated data collection capacity in general surveys, the project can contract for providing research services to individuals and institutions in search of new information.

These are just a few of the large number of ways through which the FWC can "market" itself to sources of support. The task at hand is to focus energy in identifying those sources, and then packaging materials in appropriate ways to elicit support from them. In Haiti those potential sources include all bilateral, multilateral, and major non-governmental donors (e.g., CARE, COHAN). Outside Haiti they include those same donors plus various philanthropic organizations.

In this context there is a continuing need for close cooperation in fundraising between FWC and OEF. Each can work independently of the other in certain realms, the FWC hitting up local representatives of donor agencies while OEF seeks out philanthropic institutions (especially those associated with corporations doing business in Haiti's industrial sector) in the U.S. But there are instances when, for example, the FWC may need a proposal to be carried forward in the U.S., and when OEF may need the FWC to put together a special package of materials to meet the particular interest of a potential donor (e.g., an AIDS disease education program). Because the long-term prospects for the FWC depend entirely on finding resources to sustain it, the FWC and OEF should develop a broad, coordinated strategy of action towards this end. Above all, the FWC must maximize production and diffusion of materials about itself so that it becomes better known in the development community.

The recommendations that flow from this review are three.

Recommendations

1. The project should immediately take steps to incorporate the FWC as a legal NGO with independent status.

2. The project should now place top priority on making the necessary contacts and developing the requisite materials for seeking additional funding to carry it into the future.

3. For purposes of implementing the foregoing recommendation, FWC and OEF staff should develop a coordinated strategy for financial resources development to guide actions over the next year in Haiti and the U.S.

IX. GENERAL PROJECT MANAGEMENT

Financial and administrative management of the project are generally sound. There are nevertheless three issues that warrant attention. The first has to do with budgetary planning. In my opinion an error was made when the project signed staff job contracts through the end of the project. One-year (or shorter) renewable contracts, with or without fringe benefits, were options the project did not explore. As a consequence, the budget looks like it is permanently burdened with current staff salaries, therefore giving the appearance of little flexibility for short- or long-term consultants and technical assistants for such activities as strengthening the research effort.

Although the recent leave of absence of the health coordinator liberates some funds, a replacement must be paid and the net gain is small. Similarly, transferring the $40,000 earmarked for construction of the FWC facility into other budget lines still leaves a projected deficit of somewhere between $50,000 and $80,000. Short of terminating staff contracts prematurely, and perhaps cancelling the programs which they supervise, actions which are feasible but nevertheless unfortunate, the only obvious alternative is a search for additional funds, or funded projects onto which portions of certain staff salaries can be loaded.

The second issue closely related to the first, is that the project may soon be staffed with too many high-salaried individuals relative to budgetary resources. The CA envisaged a staff of four. It has a contracted staff of six. The need for six individuals during the start-up phase of the project is clear. The need for that many through the end of the project is not as evident; especially not when the budget appears inadequate

to meet all original project goals. The CA envisaged a transfer of responsibility for direct training, once courses were up, tested, and moving along well, from staff to part-time or full-time monitors with substantially lower salaries. The staff role with respect to programs towards the end of the project, as implied in my earlier discussion of staffing in Section VI, would be one of coordination and supervision of a large number of monitors. This transfer of responsibility was central to the process of arriving at the level of cost-effectiveness that the FWC was originally intended to achieve. The appearance of two "extra" staff lines in the budget therefore suggest a limit on the resources available for monitors, and make the project appear much less cost-effective than it should be in the future.

The third issue has to do with organizational dynamics in the office. A participatory approach to management is laudable, but it places heavy demands upon every individual involved to let everyone else know what he/she is doing, to assure that those aspects of his/her work tying in to that of others is accomplished properly and on time (as measured by the criteria of those others), and to somehow or other remain cognizant of where the whole project is heading. Exceedingly important in this style of management are effective time-management, self-direction, and stress control.

Participatory management is rare because the individual characteristics required to sustain it are only very rarely to be found among a large share of individuals in a group. With regard to the FWC, I think that participatory arrangements are working well only up to a point. Moving participation beyond that point requires explicit attention and work by all members of the staff.

The Director and I had long and intense discussions on this matter, arriving at no clear consensus on what specific actions were necessary. Coupled with parallel soundings of individual staff members, I came to the conclusion that no one in the office has a firm grasp of what participatory management means in a practical sense (not surprising given their limited exposure to it), nor any firm ideas about how to make it more effective. I sensed that the moment had come for the staff to give itself a Core course in order to raise consciousness about what the project is doing and is supposed to do, about the meaning of "helping women help themselves" within the FWC office, about "taking collective charge" of their FWC-related lives, and about all the pertinent issues mentioned in OEF's Women Working Together. This kind of retreat would, I think, prove highly beneficial. It would constitute a logical follow through of the retreat held in January 1987.

My notation of issues warranting address in matters of budgetary planning, cost-effectiveness, and group dynamics within a participatory process should not detract from my opening

statement confirming the essential soundness of project management. Given the chronic urban turmoil within which the project had to function, the major struggles in which all staff engaged in order to cultivate interest and trust of factory managers and participants, the unusual circumstance of having to defend the project against accusations of it being at once staffed by communists and CIA agents, and the host of other large and small nuisances that cropped up without advance warning, the issues I have raised should not be interpreted as anything but minor points in the relative scheme of things. That these should be the only issues I found worthy of discussing here is more a testament to the patience, competence, and dedication of staff than a criticism.

Included in this compliment are the OEF staff who worked closely with their colleagues in Haiti. From what I was able to gather in conversations and in reviews of documents in Port-au-Prince and Washington, there were no instances in which important management-related actions in one city took place without the knowledge and/or approval of counterparts in the other city. All financial decisions were determined jointly. Decisions concerning recruiting, hiring, and termination of personnel followed the same pattern. In this respect, OEF is to be commended for providing all necessary training of FWC staff in matters of management, and of providing supplementary information and support whenever requested to do so. The deep involvement in the FWC of OEF's Director of Latin America and the Caribbean, her willingness to travel frequently in support of the project, and her strenuous efforts to resolve any differences between the FWC and OEF, the CIA episode being a prime example, warrants special mention. More generally, I was appreciative of the way in which OEF manifested its increasing confidence in FWC staff by gradually devolving greater administrative and technical responsibility to them. Writ large, the OEF-FWC connection is a good example of women working together to help each other help themselves.

The points I raised earlier nevertheless warrant attention, and my two recommendations are oriented to this end.

Recommendations

1. FWC and OEF staff should immediately determine the exact status of the project's budgetary commitments and thereafter develop alternative strategies for moving resources between line items in manners that will permit satisfactory completion of all key project activities. Especially important in this regard will be the transfer of resources to permit additional work on the project's research component, and to finance the shift of direct training responsibilities from staff to monitors.

2. As soon as feasible, the project should recruit a facilitator and schedule a full week for a Core-type seminar or retreat to identify, discuss, and resolve difficulties associated with organizational and administrative dynamics within the FWC. As minimum outcomes, the seminar should yield a solid collective understanding of individual and group responsibilities, and a strategy for action to guide the project over the next year.

10. OTHER MATTERS

Annex 3 contains four sets of questions posed by USAID that demand my response. The first set asks whether the FWC is an appropriate mechanism for upgrading education, skills, and living conditions of workers; whether the FWC is cost effective in reaching workers; and whether there are any alternatives.

I'll begin my response with the last question by answering that there are indeed a variety of conceivable (though not always feasible) alternatives to the FWC. With respect to programs, enough is known about Haiti and about program effects in other countries to justify implementation of projects that fill gaps in the spectrum of currently available services, or that strengthen and expand the services already in place.

Micro-enterprise training of one kind or another is presently being provided by private organizations like the HDF, FHAF, and MEDA, and is under development by the INFP as part of the World Bank's fourth education project. USAID could propose to one, some, or all of these (or other) organizations that they extend their current activities, with or without modification, to cover factory workers who either do or do not have prior business experience. I cannot be certain, but I would doubt that any of the organizations mentioned would react with much interest, in part because the private agencies are primarily in the business of lending money, and in part because they tend to believe factory workers are relatively privileged and therefore do not warrant their intervention.

With respect to health, a sector in which USAID is already heavily involved, I can imagine a project wherein a competent contractor is brought in to compete with or replace the Industrial Park dispensary by organizing a proper clinic offering a comprehensive range of services, including health education and occupational health research. Ideally, such a clinic would levy appropriate fees to workers and factories, would seek to maintain a semblance of independence from government and factories (so as not to dissuade workers from using it), and would carry on an active research agenda not only on health matters but also on the effect of health improvements on output and wages.

As regards literacy, again an area of USAID involvement, I can suppose that the government's ONPEP, Mission Alpha, or other private organizations would be happy to at least explore the possibility of using additional funding to develop new, urban-oriented materials, to train more monitors, and to thereafter offer literacy training within factories or in a more neutral location near the industrial zone. I can also suppose that if USAID establishes a matching fund approach to financing, there will be at least a few factories willing to contribute to the project and to facilitate worker access to it.

Possibilities in the matter of vocational training, of the traditional variety at least, are as numerous as the number of public and private schools presently offering such training. In a more experimental vein of the kind I outlined in Section IIf, I think that the INFP might be willing to use additional support to identify important "life skills" and then develop courses on them for delivery to factory workers.

As far as socioeconomic research of the baseline study type is concerned, I am certain that there would be no shortage of interested foreign and local institutions, including IHSI, willing to design and implement punctual research, or to establish a more permanent research entity, with USAID funding.

Indeed, except for the Core course which I tend to think of as relatively unique to the FWC, there are in principle a broad range of alternative ways of conducting the "upgrading" process. And if organizations implementing the alternatives were self-directed or instructed to pursue participatory approaches to micro-enterprise training, health education, literacy, vocational training, or research, then the means of upgrading would by outward appearances look little different than the means followed by the FWC.

However, and now I shift to the question of appropriateness, it is not evident to me that the ideas I have put forward are necessarily mutually exclusive alternatives to the FWC. They might be if the FWC were to move forward with earlier ideas like establishment of a health clinic and a credit/training program for small enterprises, or with notions like establishing its own literacy, vocational training, or research projects. But so long as the FWC restricts itself to education, human resources development, and implicit research oriented to developing and diffusing useful data and usable training materials which many of the organizations I've noted above (and others) may be able to use to good ends in their direct service agendas, one can view it as complementary to the alternative approaches I outlined. This would seem to be especially the case when my scan of what is going on in Haiti suggests that the FWC may perhaps be the only place where experiments in interactive health education are evolving, where urban-oriented literacy materials are being

developed, where revisions to traditional concepts of meaningful vocational skills are being explored, and where solid quantitative urban data are being produced. I believe that all these things need doing as precursors and complements to future projects by other agencies, and in this context of utility and complementarity find the particular role of the FWC to be appropriate not only for factory workers, but for Haiti in general.

Furthermore there are things, about the FWC which I doubt can be easily duplicated by projects that gear themselves primarily to delivery of specific services. One thing is its focus on the general circumstances of women. In a country where they constitute the backbone of the economy while at the same time having little influence on the historical course of events, such an orientation seems overdue. A second thing is the philosophy of helping people help themselves. The concept is hardly unique to the FWC, but it is extraordinarily rare that serious efforts are made to translate such words into concrete action. A third thing, for me the most salient one, is the participatory approach that allows and encourages "beneficiaries" to identify and prioritize the services that they themselves view as central to their notions of what "upgrading" means. This is not to suggest that they are necessarily correct, but in a society used to imposition of projects and services without much attention to the opinion of the "targets" (and that often go askew as a result), a bit of democracy is always welcome wherever it leads. In doing these things the FWC is conducting a process akin to a community development effort wherein the community is defined by shared experience rather than a spatial demarcation. I think that such a process is highly appropriate, if for no other reason than to demonstrate that the "assistentialist" approach to upgrading, as FWC staff call the dominant modes of public and private donor intervention, is not the only way to proceed.

Finally, on the matter of cost effectiveness, I believe the question to be premature at this stage. Measurement of effectiveness should take place during the last 6 months of the project when training is scheduled to have been taken over by monitors with materials developed through the present, and when the ratio of staff to monitors decreases to a level consistent with routinized operations. If my calculations for the literacy course are any indication, the project can become very cost effective in the longer term (i.e., within 12 months).

The second set of questions asks whether the FWC is a "luxury" project, which I understand as a query regarding whether resources are being used to assist a relatively privileged group of people by Port-au-Prince standards. My answer is that the FWC is definitely not a luxury project in this sense, for the reasons I put forward in Annex 5. Note should also be taken that it is

extraordinarily difficult for a woman with what looks like a high wage to convert that wage into high income. She is powerless in the social scheme of things, and any raise in wages she might obtain are drawn down by the immediate appearance of additional family members to support, or by demands that she transfer the funds to members of the extended family elsewhere. A woman finds a job and soon thereafter her husband reappears after a long hiatus, or her brother comes for a permanent visit, or her father sends a child to live with her. One may generally rest assured that however much a woman earns, in most cases the amount she can use for herself is brought down to a low level very quickly. In this sense, factory women are a vital part of the country's informal welfare system, and whatever gains she might extract from the FWC, they will spread out to cover many other people as well.

The third set of questions asks why women showing signs of leadership have not yet been given extra training for roles as leaders, promoters, or facilitators. In answer, I'll mention first that project staff remain fully committed to this extra training. They have not yet moved on it directly in part because they have been preoccupied with all the other priorities I discuss in this report, and in part because staff believe that more groundwork remains to be done in terms of cultivating trust of beneficiaries, building up more credibility for the FWC, and several other related accomplishments that appear to staff as prerequisites to the training. My thoughts on this issue are laid out in Section III, and my suggestions to staff about the matter are part of recommendation 2 in that Section. I believe that project staff are in full agreement with the principle behind that recommendation, and will intensify their efforts with respect to it in coming months.

The last set of questions, which I have to some extent answered in the discussion of the first set, asks whether the FWC is facilitating access to service programs rather than attempting to create new ones, and whether FWC programs duplicate other existing programs. I understood this as a concern by USAID that the FWC would press forward with a health clinic, a family planning program, a credit scheme, and other tangible service delivery activities already being pursued by other projects. When I first arrived for the evaluation there did seem to be strong interest by staff in establishing one or more service delivery programs--especially a clinic. In the course of discussions I believe that we came to mutual understanding that for the foreseeable future the FWC would remain a training/research project only, and that through its activities it would identify potentially useful services and then advocate for those services on behalf of workers. Other organizations, either independently or in some contractual arrangement with the FWC, would actually provide the services. The approach being taken to future literacy programs exemplifies the strategy to be pursued.

Annex 1

List of Individuals Interviewed

Workers on Evaluation Committee

Immacula Desalus
Marie-Lourdes Janvier
Celimene Mathurin
Anne-Marie Pillet

FWC Staff

Gladis Casimir
Sonja Gaetjens
Winifred Jean-Galvan
Clothilde Manuel
Djenane Montas
Carole Roy
Monique Souvenir

OEF INTERNATIONAL

Emily DiGiacco
Salva Levsey
Elise Fiber Smith

USAID/Haiti

Daniel Cesaire
Barry Heyman
Criss Julliard
Patrick MacDuffie
Linda Morse

Health Course Participants

Micheline Demosthenes
Desiral Elucia
Solange Medore
Marie-Louise Medy
Elise Nelson
Eliante St. Victor
Jusette St. Victor
Marie-Carmelle St. Victor

Micro-Enterprise Course Participants

Luprecia Edlin
Emma Georges
Marie-Lourdes Janvier (member, evaluation committee)
Rosette Lefort
Denise Massena
Anita Moline
Anne-Marie Pillet (member, evaluation committee)
Chena Therneus

Literacy Course Participants

Thelma Decomier
Fifi Denis
Marie-Therese Destin
Enante Edouard
Alerte Janvier
Sulphise Pierre
Lecia Turrene

Others

Michaelle Auguste (ETA, consultant to FWC)
Anthony Baker (Wilson, manager)
Guichard Beaulieu (consultant to FWC)
Carl Braun (Capital Consult)
Charles Clermont (BCI, FWC Advisory Committee)
Mike Delaney (consultant to USAID, RHUDO/Jamaica)
Gerrit Desloovere (COHAN)
Michele Douyon (FHAF)
Frederick Duthely (Automatic Accusonic, manager)
Benji Duval (ADIH)
Dr. Michele Edouard (PROFAMIL)
Chantal Hudicourt Ewald (consultant to FWC, FWC Advisory Committee)
Joy Greenidge (Foster Parents Plan)
Georges Jean-Baptiste (ETA, consultant to FWC)
Jaqui Lumark (INFP)
Kathy Mangones (HAVA)
Magalie Marcelin (HAVA, consultant to FWC)
Pere Georges Mathelier (ETA, consultant to FWC)
Feny Medema (CEBEMO)
Mirian Merlet (consultant to FWC)
Lesly Nazaire (Wilson, manager, FWC Advisory Committee)
Charles Tardieu (HRDC, FWC Advisory Committee)
Mrs. Wainwright (Automatic Accusonic, manager)
Charles Waterfield (MEDA, consultant to FWC)

ANNEX 2

TERMS OF REFERENCE
MID POINT EVALUATION

FACTORY WORKERS PROJECT - HAITI

1.- OBJECTIVES

The overall objective of the evaluation is to provide OEF, AID/Haiti and project beneficiaries with a formative evaluation of the Factory Worker's Center (FWC). The evaluation is to be conducted at approximately month 18 of a 36 month project. Specific objectives are:

a.Evaluate to what point the activities implemented by FWC in the past 18 months conform to the project's goal and purposes as per the Cooperative Agreement.

b.Evaluate whether or not the project's goal , purpose and activities as defined previously are appropriate and viable considering the new socio-political set of circumstances.

c.Propose alternatives and issue recommendations which conform to the pre-defined program and to revisions which might be designed at the time of the evaluation.

2.- SCOPE OF THE EVALUATION

The Mid Term Evaluation will consist of an assessment of all activities, programs and interventions undertaken by the F.W.C. staff to date in light of the specified goals and objectives of the project, and of specific recommendations regarding the project's future orientation. It will also consist of an evaluation of the decisions taken by staff in order to fulfil the project's objectives.

The contracted consultant, along with the FWC Research Section Staff will accomplish the following :

A- A reassessment of the project's goal and purposes in light of the new socio-political set of circumstances, and a better insight of the milieu and the target population, through the accumulated experiences of the past 18 months of the project's life.

B- A critical review of all project activities elaborated and implemented over this period based on specific indicators to be defined by the contractor and the Research Coordinator following OEF international's and AID's guidelines, and in light of the project's set of purposes. Specific recommendations for future interventions are to be made based on this review.

1- Establishment of a Factory's Workers's Center.

- Appropriate location, physical space and accessibility?

- Propescts toward construction?

- Steps taken toward fulfilling this particular project objective?

2- FWC Programs

- What programs are currently being developed or designed?

- What programs are actually prioritized?

- Are these priorities well placed?

- Does the selection of the programs that have been developed or elaborated to date respond to specific needs from the target population and to the project's objectives?

** Does the level of interest and participation suggest:

- Expanding existing programs, bringing in new beneficiaries to these programs ? or,

- Encourage existing beneficiaries to participate in several existing programs, thus keeping the number of beneficiaries and number of programs the same ? or,

- Keep the same programs with the same beneficiaries ?

a) Core Course

- Accomplishments to date ?

- Number of participants and factories to date ? Is it acceptable?

- Does the applied methodology encourage self-determination and group formation ?

- Is the material adapted adequate for the set objectives of the course ?

- What positive changes have these courses induced in the participant's behavior and attitudes ?

- What are the strengths and the weaknesses of this program ?

- How can it be improved ?

a) Core Course (continued)

- Should this program continue to represent a prerequisite to other programs ?

- Is staff sufficiently trained to develop this program ?

- Are the monitors sufficiently trained to conduct this program ?

b) Micro Enterprise:

_ Accomplishments to date, number of participants and factories?

- Is the material appropriate?

- Are the changes brought to the basic material previously developed by OEF appropriate?

- Does the program meet participants' needs?

- Does this program offer the potential to involve other family or community members with the participants?

- Are the credit possibilities envisioned to this program viable?

- Can FWC staff adequately conduct this program?

- What has been (and should be) the relationship of FWC to other institutions in this component?

c) Housing:

- Why hasn't this component been given attention so far?

- What are the constraints to the implementation of a program in this area with women workers?

-What has been (and should be) the relationship of FWC to other institutions in this component?

- What are the different viable alternatives that could be envisioned?

d) Health

- Accomplishments to date?

- Number of participants and factories?

d) Health (continued)

- Constraints met?

- Why are these activities considered priorities by staff ?

- How appropriate are the different health programs & activities designed and developed so far?

- How can (or should) these activities be expanded or implemented for the benefit of a larger number of beneficiaries?

- Is the approach used so far in the health education course appropriate?

- What are the behavioral changes induced by the health courses?

- Strengths & Weaknesses of the programs designed?

- Strength and weaknesses of the ones developed so far?

- Recommendations

e) Literacy

- Accomplishments to date?

- Number of participants and factories?

- Is the material appropriate and adequate?

- Can FWC staff adequately manage/coordinate this program?

- Can (or should) this activity be expanded to include a greater number of participants?

- How can it be improved?

- What are the constraints in this program?

- What has been (and should be) the relationship of FWC to other institutions in this component?

- What are the strength and weaknesses of this program as it has been developed so far?

f) Vocational Training

- Why hasn't this activity been implemented or designed during this past period?

- How can (or should) it be designed and developed given the project's purposes and objectives and the target population's specific needs?

g) Training Material

- How appropriate are the adapted materials?

- What are the weaknesses and the strengths of these materials.

- How can they be improved?

- What are the prospects for the diffusion of these materials to other projects?

- What are the prospects for the generation of revenues through the local marketing of these materials?

- What efforts have been undertaken in order to develop new materials for specific programs?

3- PARTICIPATION IN THE F.W.C.

A.- Women Workers

- What has been done so far to induce the project's beneficiaries (given their divergent interests) to participate in F.W.C. programs and activities?

- How can the participation and the interest of all parties concerned be maintained and stimulated in a harmonious fashion for the project's expansion?

- How have women workers manifested positive changes in their attitudes and their behavior at the personal and work level?

- How can the project stimulate greater participation from the women workers?

- What mechanisms can be developed in order to stimulate participants' integration into the daily activities of the center and in the design of specific projects activities or interventions?

B.- Factories

- What has been the level of factory participation?

- Should more companies be reached or should we concentrate on fewer factories?

- What has been factories' reaction to training:

- What financial and in-kind contribution are factories making?

- How can this be increased?

C.- Other institutions

- What has been the models and levels of institutional collaboration?

- How can these be strengthened?

4. RESEARCH AND EVALUATION

- What are the accomplishments to date ?

- Were the changes brought to the Research section's scope of work appropriate and timely?

- Is staff adequately trained for these activities?

Baseline Study on the target population:

- Is this initiative appropriate?

- How does it tie in with the project's other activities and objectives?

- Will the data collected allow for a better insight of the project's milieu and facilitate decision-making with respect to the project's future programs, activities and orientation?

- Is the methodology adopted for this study appropriate?

Project activities monitoring and evaluation

- Accomplishments to date?

- Constraints and modifications brought with respect to the initial plan?

- Importance?

Productivity Analysis/Impact of FWC activities on Job Performance.

- Is the approach designed appropriate and viable?

- What are the alternatives to facilitate the realization of this study?

5. IMPLEMENTATION PLAN

- Is the calendar of activities developed by the project staff appropriate with regard to the project's objectives and priorities?

- Is project moving along on schedule?

- Are the delays in various areas justified?

- Is there a need to bring modifications to the calendar?

- what are the recommended modifications?

6. PROJECT STAFFING

- Is staff sufficient for project's needs?

- Is staff training adequate?

- Are there clear lines of authority and responsabilities?

- what are the staff's main problems?

- How can the staff's performance be improved?

- How has staff performed in terms of decision-making?

- How effective has been the Washington office's management and supervision of the project?

7. ADVISORY COMMITTEE

- Is the concept appropriate and relevant for the project:
- Is the Advisory Committee's initial composition adequate?
- Why hasn't an Advisory Committee meeting been convened to date?
- How can this delay be compensated?
- what are the responsabilities of the Advisory Committee?

8. INSTITUTIONALIZATION

- How is the project moving towards this objective?
- What are the recommended steps to hasten the process?
- What organizational structure should be envisioned?
- What is the status of fundraising activities in Washington and in the field?
- What strategy should be adopted toward this end?
- Why haven't funds been raised up to now for the project?
- What are the main constraints to that end?
- How can the field office and also the Washington office become more effective and dynamic in this regard?

9. GENERAL PROJECT MANAGEMENT

- Are systems in place for timely and appropriate programmatic management of the project? And for financial and administrative management ? Is the project cost effective?
- What are the reporting procedures? are they adequate?

3.- METHODOLOGY

The evaluation methodology will be actively participatory, following the guidelines established by OEF, and will follow guidelines provided by USAID/Haiti. A set of indicators to evaluate the impact of specific project activities, which will be determined by the Research Section and the consultant prior to the evaluation. The following are some of the main evaluation instruments that will be part of the methodology:

1.- Critical review of project's documentation, including the cooperative agreement, the quaterly reports, a sample of the correspondence, USAID/Haiti memoranda, implementation plans;

2.- Personal and group interviews with project staff, staff of collaborating institutions, USAID/Haiti officials, factory managers, and project beneficiaries, current and past participants.

3.- Review of data collection on activities that have been implemented.

4.- Visits to on-going training activities .

5.- Interviews with other knowledgeable people on the Haitian milieu, ie economists, church persons, etc.

The evaluation process will follow these basic steps:

A. Formation of an Evaluation Committee , composed of the Research Coordinator, a factory manager that has been involved in the project, and four beneficiaries. The Project Director and the USAID/Haiti Project Officer are invited to participate as observers in the Evaluation Committee, but will not be directly involved in data collection or analysis per se. this committee will be facilitated by the contractor.

B. A Design Worshop will be convened with all members of the Evaluation Committee in order to design the evaluation process and to determine the responsibilities for the data collection phase.

C. Data Collection

D. Data Analysis and Recommendations Workshop is the time for reviewing the information collected and discussing conclusions and reccommendations. It will focus on three areas: strengths, areas for attention, action recommendations.

E. Reporting: The evaluation report is written by the contractor, a draft is submitted in typed form to OEF/Haiti, OEF/Washington, and USAID/Haiti. Comments will be given by all three parties regarding errors and omissions. A final report is presented to OEF/Haiti and OEF/Washington, which submits it to USAID/Haiti. A debriefing will be held in Port-au-Prince for OEF/Haiti and AID/Haiti, and in Wahington for OEF/Washington.

A French translation will be done in all or portions of the report and a translation will also be done on portions of the report in Creole for the project's beneficiaries, and debriefings will be held with them to discuss the evaluation. This will be done by the Evaluation committee with the contractor participating if possible. This will be the resposibility of the Project director.

F. Contractor Qualifications
1.- experience in project evaluations
2.- experience in project management
3.- fluency in French and Creole
4.- sensitivity to issues of women in development, participatory research, USAID/Haiti strategies, export processing industry sector, the political and economic framework of Haiti, urban planning, etc.

ANNEX 3

USAID ADDENDUM TO
FWC EVALUATION

1. The FWC Project is based upon various studies which show "the upgrading of worker's education, skills and living conditions is a need inherent to the process of industrialization in any country". This project attempts to respond to that need. Is the FWC an appropriate mechanism or vehicle to respond to that need? Is the FWC a cost effective means of positively and productively impacting on the lives of a significant number of factory women? What are the alternatives?

2. Is the FWC a luxury project in view of competing needs and priorities? Should we even be concerned with the world of the factory woman?

3. Per the CA, it was intended that women showing signs of leadership would be given extra training and responsibility as leaders, promoters, or facilitators. Has this occured? If not, why not?

4. The FWC is to emphasize facilitating access to existing, established service programs rather than the creation of new ones. Is this being done? Are FWC programs duplicative of other existing programs?

ANNEX 4

QUELQUES HISTOIRES REVELATRICES CONCERNANT LES COURS DE FORMATION

Positives

-1-

A Quality Products of Haiti S.A, une équipe de la DASH institution dirigée par le Dr Laroche était venue distribuer des contraceptifs (Pilules, crème, tablettes etc...) aux ouvrières.

Ces Ouvrières qui avaient déja suivi le cours de formation en santé du CPFO ont protesté energiquement contre le procédé utilisé par les représentants de cette institution qui n'avaient pas pris la peine d'expliquer les avantages, les inconvénients, les contre-indications, les effets secondaires ainsi que le mode d'utilisation de ces méthodes avant de les distribuer aux Femmes.

Les participantes ont expliqué à leurs compagnes que certaines méthodes de contraception exigeaient une consultation médicale préalable à leur usage.

Ceci a été relaté aux monitrices avec beaucoup d'indignation.

-2-

Certains propos tenus par les femmes ouvrières durant le Cours de Santé nous ont permis de constater que les informations concernant l'appareil reproductif de la femme ont servi à améliorer leur connaissance de ces organes et de leur fonctionnement.

- Mikaelle et Paulette ont avoué qu'elle ne "distinguait pas l'orifice vaginal du méat urinaire".

- Micheline pensait que "les trompes de Fallope étaient des cordes rattachant l'utérus à l'intestin et par conséquent que l'usage d'un contraceptif tel que le stérilet était à rejeter, vu que celui-ci pouvait se déplacer et arriver jusqu'au coeur".

-3-

Vu les tabous du milieu concernant les organes génitaux, les femmes ont avoué que ceci les empêchait par fausse pudeur de mentionner les troubles gynécologiques par conséquent se faire soigner. Après leur participation au cours de Santé elles ont déclaré vouloir donner à leur santé l'importance qui lui est dûe. Ceci a été illustré par l'une d'entre elle de la façon suivante :

"Une voisine a du subir une Hystérectomie par suite d'une négligence dûe à son ignorance et ses tabous".

-4-

Anne-Marie, après avoir participé aux cours de Santé et de Ressources Humaines, continue à assister au cours de Micro-entreprise bien qu'elle ait été congédiée. La distance de son lieu de résidence (Carrefour) et les frais de transport ne semblent guère la décourager; elle affirme que les avantages qu'elle tire de ces cours compensent tout ceci.

-5-

Jeanine, participante au cours de Ressources Humaines, avait assisté au débat sur la prévention du Sida organisé par le CPFO. S'étant par la suite retrouvée en présence d'un cas dans son quartier, elle a alerté les parents sur la nature des symptômes qui lui semblaient être ceux du Sida. Elle a été très fière que ses appréhensions aient été confirmées par le médecin qui a effectivement diagnostiqué le virus du Sida. Elle est maintenant confiante de pouvoir mettre ses nouvelles connaissances au service de sa communauté.

-6-

Yva, superviseuse à Automatic Accusonic, nous a rapporté qu'elle était impressionnée de l'attitude positive des participantes de son usine et de leur intérêt pour le cours. Elle a offert à l'équipe du CPFO sa collaboration et affirmé être disposée à y référer les femmes tant qu'il y aura des cours.

-7-

Les diverses attitudes ou anecdotes contées par les femmes nous ont permis de noter que toutes les informations recueillies lors des cours étaient transmises systématiquement dans le milieu familial. Par exemple, durant la 2ème session de formation sur les droits de la Femme, les participantes ont formulé des questions spécifiques à la demande de voisins ou de parents n'ayant aucun contact direct avec le centre.

-8-

Les relations entre Chantal Ewald, avocate, et les participantes au cours de Ressources Humaines ne se sont pas arretées après les sessions. Elle a été contactée par l'une des participantes à son cabinet et d'autres ont manifesté, auprès des monitrices, le besoin d'avoir ses coordonnées pour une éventuelle assistance juridique (Marie-Lourdes, Jeanine, Rosette).

-9-

Durant l'évaluation participative du 3ème Core Course (monitrices-participantes), les participantes ont exprimé clairement qu'elles avaient été frappées et très satisfaites des relations établies entre les cadres du CPFO et elles. Ceci peut être illustré par les témoignages suivants:

- "Si à mon arrivée, j'avais retrouvé la dynamique traditionnelle Prof - Elève je ne serais pas restée."

- Tout en étant consciente des différences de classe existant dans le pays, les relations avec les cadres du CPFO, ont permis de dépasser ce blocage pour réaliser un travail commun.
" Nous ne pensions jamais établir de telles relations avec des gens comme vous"-
Ceci a été exprimé en référence à certains comportements et attitudes habituellement rencontrés (mépris, supériorité etc).

-10-

L'intérêt manifesté par les participantes pour les activités réalisées dans le CPFO, particulièrement au Cours de Micro Entreprise, se reflète par le fait que huit d'entre elles ont accepté d'attendre 1 heure, après leur journée de travail avant de pouvoir participer à la session. Ce groupe comprend des femmes mariées et enceintes.

-11-

A la Quality Products of Haiti en dépit des intimidations exercées sur les participantes au Cours de Ressources Humaines par d'autres ouvrières, le contact progressif avec le centre a détruit leur doute. Ces participantes sont même arrivées à convaincre les ouvrières qui les découragaient à participer aux activités du Centre. Actuellement ces ouvrières auparavant sceptiques sont les plus assidues au cours de santé.

Il convient de signaler paradoxalement que l'absence de toute forme d'assistance matérielle ou financière constitue un facteur important à leurs yeux. Les connaissances qu'elles acquièrent de ces programmes constituent également un attrait important.

Négatives

-1-

Lors d'une première rencontre des participantes de différentes usines afin d'organiser une activité culturelle pour la Journée Internationale de la Femme, nous avons noté chez différents groupes un manque de coopération. Chacun voulait bien participer mais, avec son groupe initial. Cette rencontre a été appropriée pour susciter la collaboration entre ouvrières travaillant dans différentes usines.

-2-

Suite au départ d'une monitrice, des participantes ont cru que les solutions à certains problèmes seraient compromises. Par exemple leur référence à des centres de Santé. Ceci prouve qu'une certaine dépendance des femmes vis à vis des monitrices existe encore.

-3-

Certaines participantes du groupe pilote en Ressources Humaines ont manifestement exprimé leur déception et par la suite un manque d'intéret pour les activités du Centre. Ceci est dû à une mésinterprétation des objectifs du Centre. Ce groupe semblait attendre plutot une assistance matérielle du CPFO.

Annex 5

Household Income Distribution Among Factory Women

Raw data entries compiled by the FWC Research and Evaluation Section from the baseline survey of July 1986, suggest an average household income of $134.00 per month from all sources. This figure may be an underestimate, in part because of under-reporting (especially at the low income end), and in part because the survey questionnaire did not ask for the income of each household member. It asked, more precisely, for the contribution made by each member to household maintenance. For respondents, factory workers, these contributions were identical to their earnings. For others, the contributions may have been less than the amount of their earnings, as would be the case, for example, of a husband earning $100.00 per month, contributing $50.00, and retaining the balance for other uses. Analysis of the characteristics of household expenditures, a task to be undertaken in coming months, will permit some refinement of the income data. But in the interim, and in a context where there are no comparable data available, the statistics are helpful in deducing the economic circumstances of households.

Especially insightful in this regard is the distribution of per capita income among households, shown in the three right-hand columns of the attached table. As a measure of household welfare, this per capita figure is superior to total income because it incorporates household size, and thereby suggests the level of resources available to meet the needs of family members. A two-person family with $100.00 per month, for example, has $50.00 available per member. In contrast, a family with 10 individuals earning the same amount in total has $10.00 available per member, and is substantially poorer than the previous one. For the whole sample, the average per capita income is $26.30 per month (with average household size being 5.05 individuals).

Although the per capita figure should at some point be adjusted for the age structure of households to yield per adult-equivalent figures (i.e., to adjust for the fact that two young children are equivalent to one adult in terms of food and other types of consumption), the per capita distribution is revealing. When compared to the cost of meeting certain basic consumption needs the distribution permits elaboration of a sense of the degree of relative poverty in the population.

For example, with retail market price data for 1985, I have estimated the cost of producing 1800 daily calories of food consumption (from a basic diet of corn or rice--these cost the same in terms of calories per penny in 1985--and beans) at approximately $12.00 per month per capita. Although likely

exaggerated by under-reporting, the table suggests that some 20% of households would not have been able to consume 1800 daily calories per capita even if they had spent all of their income for food. In operational terms this implies that a significant share of household members consumed less, sometimes substantially less, than 1800 calories.

Another way of interpreting the data, suggested by Michael Lipton in his definition of "ultra-poverty," is to estimate the share of the population that would have to spend 75% or more of income to obtain 1800 calories, i.e., those with $16.00 per capita per month or less. Against this criterion, 32.7% of families, or about one-third of the total, were "ultra-poor" in 1986.

Both these approaches highlight relatively extreme poverty. A less stringent approach, one which offers the possibility of defining a general "low income" population comparable to populations in other cities in developing countries, is to assume that any household spending 55% or more of income to obtain the 1800 calories (i.e., $22.00 per month) is "low income" in the relative scheme of things. In urban Thailand, for example, a study by the International Food Policy Research Institute suggested that the share of population in this circumstance was about 15%-20%. Applying the same criterion to the table yields a share of about 45% in Port-au-Prince.

Regardless of the method of computation, or of the degree of potential underestimation of income, the basic upshot remains that a large segment of factory women live in families that in 1986 were quite poor even by Port-au-Prince's (low) standards of relative measurement. Such a finding suggests that the conventional wisdom among many in Haiti's development community, a wisdom to the effect that factory workers have relatively high wages and that they therefore constitute something of a middle-income catagory in the city, is not substantiated by the evidence. While it may be possible that the women have high relative earnings (an assumption that also needs testing before being set out as a statement of fact), the combination of these earnings and those of others, relative to family size, are very often insufficient to maintain consumption standards much above bare essentials.

This is all to suggest that factory women do not constitute a homogeneous income group. By and large, the women are scattered throughout the city's household income categories, from the most miserable to the most comfortable, and like the rest of the ordinary urban population, are heavily concentrated at the low end of the income distribution. And the basic point worth making in this respect is that the FWC can hardly be labeled a "luxury" project in terms of its target population. That target is in some regards a cross-section of the city's population. In

most respects the target is the poor.

Household Income Distribution of Factory Women, July, 1986
(from Raw Data Files, N = 265)

Total Household Income

INCOME BRACKET	MEDIAN OF BRACKET	% OF TOTAL
Less than $49.99	43.00	9.1%
50.00 - 74.99	64.00	13.2%
75.00 - 99.99	83.00	23.0%
100.00 - 124.99	108.00	14.0%
125.00 - 149.99	137.00	10.6%
150.00 - 174.99	162.00	9.4%
175.00 - 199.99	189.00	6.0%
200.00 - 249.99	217.00	5.3%
250.00 - 299.99	276.00	3.0%
300.00 - 399.99	314.00	3.0%
400.00 - 499.99	412.00	2.3%
500.00 or more	582.00	1.1%
TOTAL (Avg.)	($134.00)	100.0%

Per Capita Household Income
(Total Divided by Family Size)

INCOME BRACKET	MEDIAN OF BRACKET	% OF INCOME
Less than $9.99	8.00	12.8%
10.00 - 14.99	12.00	14.0%
15.00 - 19.99	17.00	17.7%
20.00 - 24.99	22.00	15.8%
25.00 - 29.99	27.00	10.6%
30.00 - 34.99	32.00	7.2%
35.00 - 39.99	36.00	5.7%
40.00 - 44.99	43.00	5.3%
45.00 - 54.99	50.00	4.2%
55.00 - 59.99	57.00	2.6%
60.00 - 79.99	65.00	1.9%
80.00 or more	87.00	2.2%
TOTAL (Avg.)	($26.30)	100.0%