

**EVALUATION OF  
THE PARTNERS OF THE AMERICAS**

**Agency for International Development  
Washington, D.C. 20523**

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Development Associates, Inc.

Evaluation of The Partners of the Americas

March 1976

89 pages:

3 annexes

AID Contract Number: AID/otr-C-1382

AID Project Number: 5980436

Source: DIS

ARC Catalog No. LAT 341.181812 D 489

The program of the Partners serves the interest of the United States by involving volunteers in activities to build bridges between the people of the United States and the people of Latin America and to provide inexpensive technical assistance and training that contributes to development. However, with only 30 to 200 members in each of the State Partners visited, the program is far from its potential. The evaluation was handicapped by lack of reliable statistical information, but a study of 46 projects showed a significant contribution to development at a very low cost to the United States. Despite the small size of their active membership, the state Partners are reasonably effective in obtaining the participation of the private and public sector in collaborative activities with their Latin American Partners and in stimulating public awareness. The Latin American Partners, with even more limited membership than their U.S. Partners, are generally effective in drawing on the private sector and some governmental resources for modest but effective projects which benefit their countries. All need guidance on Partner operations, program and project development, and development priorities. The evaluators made many recommendations including: (1) State Partners should expand their programs and their membership; and (2) AID and the Partners should plan on an orderly phase-out of AID financing.

## EXECUTIVE SUMMARY

Development Associates, Inc. (DA) undertook an evaluation of the Partners of the Americas for the Agency for International Development under contract number AID/OTR C-1382, Work Order Number 1.

The Partners of the Americas were established by AID in 1964, to facilitate economic and social development through the private sector and strengthen mutual understanding among the people of the United States and Latin America. The U.S. branch of the Partners, the National Association of the Partners of the Americas (NAPA) was incorporated in November 1966, and became fully operational July 1, 1970. However, AID has continued as the principal source of funding of the NAPA staff and the travel of the volunteers to provide development - related technical assistance and training.

### SCOPE OF STUDY

NAPA and AID had agreed on the scope of work for the evaluation well in advance of the study. Field work began November 14, 1975 and with periods of inactivity due to the holidays, was completed January 28, 1976. The study included attendance at NAPA's annual conference, review of records and interviews with Washington staff of AID and NAPA, visits to eight state Partners and their eight Latin American Partners. Evaluators interviewed 376 knowledgeable people, attended 11 board meetings of U.S. and Latin American Partners, and visited 62 projects with 46 studied in some depth.

### FINDINGS

- The program of the Partners serves the interest of the United States by involving volunteers in activities to build bridges between the people of the United States and the people of Latin America and to provide inexpensive technical assistance and training that contributes to development. At the same time, it must be recognized that with only 30 to 200 members in each of the State Partners visited, the program is far from its potential.
- Although the evaluation was handicapped by lack of reliable statistical information, a study of 46 projects shows a significant contribution to development at a very low cost to the government of the United States. Some findings:

- 78% of the projects addressed at least three of AID's five guidelines;

- 10 of 14 new or revitalized projects addressed at least four of the five guidelines:
- only 13 percent of the projects may be classified as not being successful;
- Because the projects are staffed by volunteers, they tend to be small and their impact is generally limited to local areas but some have a catalytic effect on national development;
- 290 visits for technical assistance and training, valued at \$3,300 each, were made for an AID investment of \$98,009. This came about because the U. S. and Latin American Partners generated \$85,354 to supplement NAPA's partial funding of 163 trips from AID - supplied funds to provide for 127 additional trips, a total of 290 visits. NAPA estimates the value of the services of these technicians at \$874,410. Combining the value of the donated services of the technicians and the donated funds for travel we have a total of \$959,764 or a return of about 10 to 1 on AID's investment.

Despite the small size of their active membership, the state Partners are reasonably effective in obtaining the participation of the private and public sector in collaborative activities with their Latin American Partners; in stimulating domestic public awareness and interest in the partner country and in getting the personal support and involvement of key state figures in their programs. On the other hand, none of the eight Partners has drawn on the potential contribution of the state in fields such as agriculture, nutrition, health and education and none has developed programs for state-wide participation of the public, volunteers and collaborating organizations.

The Latin American Partners, with even more limited membership than their U. S. Partners, are generally effective in drawing on the private sector and some governmental resources for modest but effective projects which benefit their countries. However, only one can be considered as a fully equal member of a LA-US Partnership. All need guidance on Partner operations, program and project development, and development priorities.

The NAPA staff has pressed hard in recent years for a greater development orientation in State Partner programs. This has included:

- administration of travel regulations for volunteers in a very frugal manner. This has resulted in the wider use of AID-supplied funds and has encouraged increased U. S. and Latin American financial commitment. Nevertheless, a minority of the Partners studied perceive NAPA's administration of travel funds as affected by bias and favoritism.

- Seminars on rural development and rural health.
- Guidance to the Partners by an increasingly professionalized staff.
- Giving a major role at the annual conference to subjects relating to development.

NAPA staff has undertaken various fund raising efforts which are ahead of targets established in the AID grants. Financially, however, NAPA is far from becoming a self-sustaining organization.

NAPA has yet to undertake rigorous programs to encourage the state Partners to broaden their membership, to expand their programs, and help pay the costs of travel of the volunteer technicians and NAPA staff.

### RECOMMENDATIONS

NAPA should establish one or more task forces to examine and recommend improvements in all aspects of statistical reporting for discussion by the members at the next annual conference.

State Partners should expand their programs and their membership geographically to involve people in all parts of the state and in all fields important to development.

To overcome financial dependence on AID, NAPA staff should intensify its fund-raising efforts. Of even greater importance, the state Partners should undertake membership expansion and fund-raising activities to meet their operational needs, the costs of the travel of the volunteers, and should these efforts be successful, some of the costs of NAPA staff.

NAPA should establish a task force to examine the travel regulations and their administration, with particular reference to the need for further clarification of travel related to program and project development. This task force should also examine the belief or feeling held by some Partners that some NAPA decisions are affected by bias or favoritism. The report should be available for discussion by the membership at the next annual meeting.

NAPA staff should provide guidance and assistance to the Latin American Partners. The Latin American Partners should also participate fully in annual NAPA conference and assume a role of equal Partners in the partnership.

• AID should develop a more effective dialogue with the Partners. This dialogue should provide AID with a better understanding of the resources limitations of volunteer technicians. It should also provide the Partners with a better frame of reference for decisions affecting their own priorities by acquainting them with the aims and objectives of AID and the Department of State with regard to Latin America and the programs and priorities of the AID missions.

• AID and the Partners should plan on an orderly phase-out of AID financing over a three to five year period, preferably five years. The program should include the establishment of targets for orderly reduction of funding, a planned turn-around in which the state Partners undertake a substantial increase in membership and local fund-raising, and NAPA provides guidance and assistance on the turn-around with the necessary funds for that purpose provided by AID.

## REFERENCES TO RECOMMENDATIONS

Recommendations in the report are included, along with the findings on which they are based, under each element in the scope of work. To facilitate consideration of the recommendations by categories of actions proposed, we are grouping below the references by major active categories.

### Aid Guidance

VI B 2 b (3)  
VI D 2 b, c, d  
VII C 2 a, b  
VII E 2 b  
VIII E 2 b  
IX E 4  
XI B

### Assistance to Latin American Partners

VII B 2 a, b, c, d, e  
VII C 2 a, b, c  
VII D 2 a, b  
VII E 2 a, b  
IX E 4

### Fund Raising and Financing

VI E 2 a, b  
VII D 2 a, b  
XI B

### Improvement of NAPA

VI F 2 a, b, c  
VI H 2 c  
VII B 2 c  
VII C 2 a, b, c  
VIII C 2 c

### Statistical Reporting

VI B 1 b (1) (a), (b)  
VI C 2 a, b, c, d  
VIII D 2 a, b, c  
VIII F 2 a

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### Legend:

- \* Roman Numeral indicates Chapter Heading.
- Capital Letter indicates sub-heading of Chapter.
- Number indicates section of sub-heading.
- \* Small letter indicates a sub-section.

EVALUATION OF  
THE PARTNERS OF THE AMERICAS

Study Undertaken for  
The Agency for International Development  
Contract # AID/OTR-C-1382  
Work Order # 1  
November 1975

BY:

DEVELOPMENT ASSOCIATES, INC.  
New Hampshire Avenue, N. W.  
Washington, D. C. 20036

MARCH 1976

**DEVELOPMENT ASSOCIATES, INC.**

**MANAGEMENT AND GOVERNMENTAL CONSULTANTS**

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March 26, 1976

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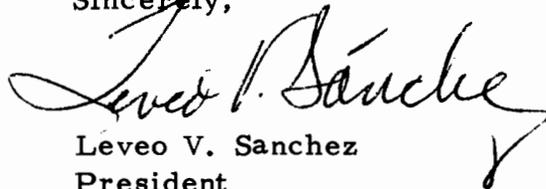
Dear Mr. Marasciulo:

In accordance with the requirements of Article IV of contract number AID/OTR C-1382, Work Order Number 1, enclosed please find ten copies of the report on the Evaluation of the Partners of the Americas. We are also, as required by the contract, including camera ready copy so that AID can reproduce and distribute such other copies as may be needed.

We shall appreciate it if you can provide copies promptly to Mr. Gerald Schwab, Evaluation Officer for the Bureau and to Mr. William Wren, the Project Manager for the IQC contract under which this evaluation was undertaken. We assume that you will make copies available for the Partners, particularly the eight U. S. and Latin American Partners who collaborated in this study.

If we can be of further service, please let us know.

Sincerely,

  
Leveo V. Sanchez  
President

LVS:evh  
Enclosures

## TABLE OF CONTENTS

	Page
Letter of Transmittal	
I. INTRODUCTION . . . . .	1
II. EXECUTIVE SUMMARY (Under Separate Cover)	
III. DEFINITIONS . . . . .	3
IV. OVERVIEW OF THE PARTNERS . . . . .	4
A. Background . . . . .	4
B. Structure of NAPA . . . . .	5
C. Funding . . . . .	6
V. KEY ISSUES . . . . .	8
VI. STATE PARTNERSHIPS IN THE U.S. . . . .	9
A. Introduction . . . . .	9
B. Extent of Local and State-wide Participation in the Partnership as well as the Degree of Viability and Effectiveness of the Partnerships . . . . .	10
C. Number and Scope of Projects Conducted Annually . . . . .	20
D. Ability and Willingness of Partnerships to Promote, Develop, and Implement Self-help Projects of a Socio-Economic Development Nature with Special Emphasis on AID Guidelines . . . . .	23
E. Access to Private Funding and Other Support of Projects . . . . .	25
F. Dependence of the Partnerships on the Program and Administrative Services of NAPA Staff . . . . .	31
G. Relationship between Partnership Expenditure on Projects and Development Aspects of Projects . . . . .	34
H. Effectiveness of Volunteer Technicians' Travel and Administrative Services Provided by NAPA in Supporting Development Goals . . . . .	35
VII. LATIN PARTNERSHIPS	
A. Introduction . . . . .	37
B. Extent of Local Participation within the Partnerships as well as the Degree of Viability and Effectiveness of the Partnerships . . . . .	37

- C. Ability of Partnerships to Promote, Develop and Implement Self-help Projects . . . . . 41
- D. Access to Private Funding and Other Support of Projects . . . . . 42
- E. Extent to which the Partnerships Recognize the New Guidelines and have the Interest and Ability to Develop Projects that Meet Developmental Goals with Special Emphasis on AID Guidelines . . . . . 43

VIII. NATIONAL ASSOCIATION OF THE PARTNERS OF THE AMERICAS . . . . . 46

- A. Introduction . . . . . 46
- B. Effectiveness of NAPA Leadership in Encouraging Partners to Develop Projects with Development Impact . . . . . 46
- C. Criteria Used to Determine Allocation of AID Funding . . . . . 49
- D. How Often do Development Projects Result from AID Supported Activities . . . . . 51
- E. Relationship between AID Provided Funds and the Number of and Efficiency of Development Projects . . . . . 53
- G. Effectiveness and Efficiency of NAPA's Efforts in Generating Support for the Program from Sources Other than AID . . . . . 56
- H. Becoming Independent of AID Support for Administrative Financing . . . . . 58
- I. Servicing the Partnership and Promoting a National Image for the Program to the Extent it Supports Development . . . . . 59
- J. Servicing of the Partnership takes a Variety of Forms with Significant Changes Occuring in the Last Year or Two . . . . . 60

IX. IMPROVING PARTNERSHIPS THROUGH REGIONAL WORKSHOPS, COMMITTEE ORGANIZATION AND EXPANSION, LIAISON WITH STATE-NATIONAL ORGANIZATIONS, PUBLICATIONS OR BROCHURES AND NEWSLETTERS, AND ADMINISTERING VOLUNTEER LATIN AMERICAN TRAVEL GRANT FUNDS IN TERMS OF DEVELOPMENT IMPACT ABROAD . . . . . 63

X. OTHER EFFECTS . . . . . 64

- A. Generating Among U.S. Participants a Commitment to Humanitarian and Economic Assistance for Latin America . . . . . 64
- B. A Change in Attitude Towards Latin America Among U.S. Participants . . . . . 66

	Page
C. The Degree to which Latin Participants Develop a Greater Understanding of the United States through their Involvement in the Program . . . . .	67
D. Support for the Aims of the "People to People" Program . .	68
E. Recommendations . . . . .	69
 XI. KEY QUESTIONS RAISED BY AID . . . . .	 70
A. The Institutional Basis of NAPA . . . . .	70
B. Continuity of AID Funding . . . . .	72
C. Activities in Graduated Countries . . . . .	77
 ANNEXES	
I. SCOPE OF WORK - NAPA . . . . .	79
II. GUIDELINES APPROVED BY THE BOARD OF DIRECTORS OF NAPA FOR THE DEVELOPMENT OF LOCAL STATE COMMITTEES . . . . .	83
III. SUMMARY DESCRIPTIONS OF PROJECTS STUDIES IN LATIN AMERICA . . . . .	84

## I. INTRODUCTION

An evaluation team of four members of the professional staff of Development Associates, (DA) Inc., conducted an evaluation of the Partners of the Americas. The work was performed under contract with the Agency for International Development, Contract Number AID/otr-C-1382, Work Order number 1, dated November 13, 1975. The scope of work for the study had been agreed to by AID and the National Association of the Partners (NAPA) of the Americas. The survey team, all regular DA staff members, was composed of Hiram S. Phillips, team leader; Dr. Malcolm B. Young, Bernard J. Fiskin, and George A. Reagan. Mr. Phillips had served with AID for 16 years. All members of the team have lived and worked in Latin America and have participated in voluntary organizations. All have had experience in evaluation studies.

This study was part of AID's normal practice of periodic independent evaluations of projects in which AID has made substantial investments over several years. An earlier evaluation was completed in 1971. There was added urgency to this evaluation as AID is under instructions from a joint Senate-House appropriations conference committee to phase out funding of the Partners, but another group of Senators, as well as members of the House Appropriations Committee, have voiced strong support of the Partners.

The study included:

- attendance at the Annual NAPA Conference in Albuquerque;
- interviews and review of records in AID/Washington and NAPA;
- visits to eight U.S. Partners;
- visits to eight Latin American Partners and discussions with Embassy and AID Mission personnel; and
- review of 62 Partners projects in Latin America, 46 in some depth.

The selection of Partnerships for study was based on a formula which took into account the economic levels of the countries, their geographic distribution in Latin America, the size of the Partners' development program, the maturity of the partners and the status of the country AID program--on-going, phasing out, or graduated. After reviewing the proposed sample with AID and making a number of changes, the list was reviewed with the NAPA staff and one further change was made.

The Partners selected for study were:

Bolivia	-	Utah
Brazil (Pernambuco)	-	Georgia
Brazil (Sao Paulo)	-	Illinois
Colombia (Cali)	-	South Carolina
El Salvador	-	Louisiana
Nicaragua	-	Wisconsin
Paraguay	-	Kansas
Venezuela	-	Tennessee

These eight represent almost one-sixth of the 46 Partners and one-third of the expenditures of AID-supplied funds for the use of the state Partners.

In the course of the study, Development Associates' evaluation team interviewed 376 men and women in the United States and Latin America. This included 120 in the eight states, NAPA staff, and AID/ Washington; 49 in the U. S. embassies and AID missions; and 207 in the Latin American Partners and related activities. Team members attended three state Partners board meetings in the United States and eight in Latin America. In all, 62 projects were visited and 46 studied in depth. (See Annex III for descriptions)

The intent of this evaluation is to assist AID in formulating policy and operating relationships with the Partners by assessing two broad questions:

- the contribution of the Partners to AID development goals; and
- the success of the Partners in establishing a self-sustaining national association.

It is also hoped that this report will assist the Partners to improve their programs and operations as well as their relationships with AID .

The report is organized as follows: Following the letter of transmittal and the Introduction, there is a brief executive summary which groups together the principal findings and recommendations into various categories for consideration and decision-making; the next brief section contains a set of working definitions which should be helpful in understanding a few of the terms used in the report. There follows a brief overview of the Partners. Following identification of key issues, the report then treats the U. S. state Partnerships, the Latin Partnerships, NAPA and Other Effects as well as the three additional questions raised by AID. Each of these sections begins with a general description and is followed by treatment of each of the elements or questions in the scope of work. Within each of these elements, the findings are followed by specific recommendations. The annex contains selected documentation.

### III. DEFINITIONS

AID Country Program: The program of the Agency for International Development to assist a Latin American country in its program of economic and social development.

Board of Directors of NAPA: The policy-making body of the National Association of the Partners of the Americas, composed of one representative from each of the state Partners.

Board of Directors of the Partners of the Americas: The policy-making body of the Partners composed of U. S. representatives of federations of Partners in Brazil; Central America; South America, Mexico, and Carribean.

Executive Committee of NAPA: The body that implements NAPA board policy and directs the NAPA staff, composed of seven NAPA Board members (who are also U. S. members of the Board of the Partners of the Americas), four elected officers of NAPA (Chairman of the Board, Vice-chairman, Secretary, and Treasurer), and the President of NAPA, selected by the Executive Committee, who is a non-voting member of the committee.

Graduated Program (Country): A country in which the AID program has been terminated.

Latin American Partner: An organization of volunteers in a country, state or region of a country, in Latin America which has the responsibility for developing programs of mutual benefit with a state Partner.

National Association of the Partners of the Americas (NAPA): The organization of the state Partners in the United States, the U. S. arm of the Partners of the Americas.

NAPA President: The person selected by the executive committee to direct the program and activities of the NAPA staff.

NAPA staff: The central staff organization of NAPA which, under the direction of the NAPA executive committee, provides services to and support for the state Partners.

Ongoing Program: The AID country program in one of the poorest countries which is expected to continue, subject to the availability of funds, to provide assistance to the country's efforts for economic and social development.

Partners of the Americas: An organization of state Partners in the U. S. and Latin American Partners to develop and promote activities and projects of mutual benefit to the United States and Latin America.

Phasing-out Program: An AID country program in which AID has set a date for termination of its program.

State Partners: An organization of volunteers in one of the United States set up to develop programs of mutual benefit to a country or state (or region) in Latin America and the Partner's state in the United States. Some states, e. g. , Michigan, have two Latin American Partners, and in some cases a region, e. g. , Southern California, may have Partner status.

#### IV. OVERVIEW OF THE PARTNERS

##### A. Background

The Partners were conceived and established by AID personnel in 1964. The general objective was to develop greater U. S. and Latin American citizen involvement in the Alliance for Progress as a non-governmental resource and to promote better understanding of the needs and resources for economic and social development through people to people activities.

On November 29, 1966, NAPA was formally set up as a separate legal entity, funded from AID appropriations, with the expectation that at some unspecified future time it would become a self-sustaining organization. AID, however, maintained substantial operational control through a transitional period ending June 30, 1970.

The purposes of the association are: "to unite in common organization, groups, associations, and partnerships in the United States so that, through common efforts, interchange and mutual cooperation, the common goal of advancing the social and economic well-being of the peoples of the Americas, through private undertakings based upon considerations of human dignity and mutual responsibility, may be encouraged and otherwise fostered; and to participate in an international organization called 'Partners of the Americas, Inc. ' which joins groups, associations, and partnerships throughout the Americas dedicated to the aforesaid common goal, and to consult with the 'Partners of the Americas, Inc. ' and cooperate with it on major policies affecting such common goal. " (By-Laws, Article I).

For most of its history the Partners have been primarily a people to people program but with important attention to developmental activities. Within the past two years, however, there has been a dramatic increase in attention to developmental efforts, seemingly due to pressure from AID, a grant from the Lilly Endowment, and new directions stimulated by some of the Partnerships.

There are 46 Partners in 43 states allied with Partnerships in 18 Latin American countries. Most of the Partnerships were set up in the 1960's and only five have been started since 1970. As the Partnerships are run by volunteers, the scope and quality of their programs ebb and flow with the quality of leadership and the personalities involved.

Linkage between the state Partnerships in the United States and in Latin America is achieved at several levels. A relationship is established directly between the two collaborating Partners by various understandings, usually reflected in the articles of incorporation of the Partner in the U. S. and of the Partner in Latin America. From an operational point of view these understandings are reinforced by the requirement that NAPA funds for travel of volunteer-technicians will be available only if the particular undertaking is endorsed by chairpersons of both the U. S. and Latin American Partners concerned.

At a second level, U. S. and Latin American Partners are members of their respective geographic federations: The U. S. -Brazilian Partnerships; the U. S. -Central American Partnerships; and the U. S. -South American, Mexican and Caribbean Partnerships.

At the third level there is a board of directors of the Partners of the Americas. This board has 14 members, seven Latin Americans and seven North Americans. The seven North Americans are the same individuals who represent the state Partners in the geographic federations. They also constitute the majority of the members of the NAPA executive committee which is concerned with the day-to-day activities of the Partnership in the United States and is in direct control of the NAPA staff.

These formal structures do not play a major role in the program because of lack of funding and staff as well as problems of speaking for disparate Latin American Partnerships. On the other hand, NAPA, which is the organization of Partners in the United States, because of funding, availability of professional staff, and the strengths of volunteerism in the U. S. tends to become the Partners organization.

#### B. Structure of NAPA

There are four main components of NAPA:

- the 46 Partners in 43 states;
- the board of directors composed of a member selected by each state Partnership in the United States;

- the executive committee selected by the board; and
- the NAPA staff.

NAPA operates under Articles of Incorporation approved November 29, 1966, and revised By-Laws adopted November 16, 1974.

The executive committee, which has oversight over the operations of the staff, is composed of 12 persons--the four elected board officers (chairman, vice-chairman, secretary, treasurer), seven members from the U. S.-Latin American federations mentioned above, and the NAPA president as a non-voting member.

Article VIII, Section 4 of the By-Laws confers on the executive committee authority and responsibility for:

"approving the operating plan, for establishing and overseeing the budget in accordance with guidelines and priorities established by the board of directors at the annual meeting, for staff selection and supervision, for appointing a president and/or executive director and fixing his compensation, and for contractual relationships and liaison with national and international entities in both the public and private sectors. "

The state Partnerships are separate entities usually incorporated under state laws. Largely independent, they are subject to guidance and persuasion by NAPA. NAPA's only direct control over the Partnerships, however, is the approval of funds, largely provided by AID, for the travel of volunteers for program purposes. Because of the sensitivities involved in travel approval, such approvals (and disapprovals) technically are handled by the travel committee of the executive committee; in practice the work is handled by NAPA staff with right of appeal to the travel committee. For the eight Partnerships surveyed, NAPA funded 181 trips for all types of Partner activities at a cost of \$110,530. The developmental work funded from the AID grant amounted to 163 trips at a cost ranging from a low of \$6,254 in a Partnership just getting started to a high of \$18,364. The average developmental cost was \$12,251 for the eight states, and \$7,211 for all 46 Partnerships.

#### C. Funding

Over the past five years AID has made available \$2,574,000 for the Partners. This money has been used for the administration of NAPA and for the travel of volunteers, roughly half for each of these two categories.

During this same five year period NAPA has raised \$951,765 from other public and private sources, including the Coca Cola Company, the Bureau of Educational and Cultural Affairs of the Department of State, and the Lilly Endowment. All but \$26,000 of this money was raised in the last three years. During the three years in which AID grants have contained a target figure for NAPA fund-raising from other private and public sources, NAPA has raised \$922,951, roughly \$300,000 more than the AID target. Funds raised from these non-AID sources amount to 28 percent of NAPA receipts. In addition, in FY 1975, the eight state Partners studied almost matched the \$98,009 of AID-provided NAPA travel funds for developmental activities by obtaining \$85,354 from other U. S. and Latin American sources.

For 1976 AID has projected an allocation of \$250,000. No estimate is available for other sources of funding. In addition to continuing efforts to obtain funds from a variety of private and public sources, NAPA launched a carefully designed fund-raising program on February 18, 1976, with a goal of creating a five million dollar endowment.

The state Partners in the United States are not oriented toward fund-raising. While they usually do not encounter undue obstacles in raising money or getting contributions of services for projects, their bank balances for administration are modest, usually limited to a few hundred dollars. This money usually comes from such sources as dues from a small core of members, voluntary contributions, a small profit on citizen exchange programs, and other small fund-raising activities. As presently constituted, the U. S. Partners cannot be viewed realistically as a source of funding for nationwide use or for NAPA staff administration.

Two of the Partners studied have received substantial state appropriations for program administration, but these are highly restricted and can be spent only within the state.

The Latin American Partners, highly influential in working within the power structures of Latin America and in getting local support for projects, operate on even more modest budgets for program administration. Most effective in getting endorsement of projects and involvement of key people, they are also effective in getting substantial contributions of services, payments for some air transportation, hotels, meals, local transportation, etc. They are not at a stage, however, where they can be looked to as a source of funding for the Partnership system, i. e., beyond their immediate Latin American-U. S. Partnerships.

## V. KEY ISSUES

Underlying the fact-finding and analysis required to respond to the scope of work are six critical questions which only AID and the Partners can answer. In our discussion we shall attempt to identify various considerations which should be helpful in developing national policy.

The questions:

- Given AID's decreasing resources as well as current program emphasis, do the Partners provide a resource that AID needs and should use?
- The Partners are basically a "people to people" program with increasing attention to institutions and institutional interchange. Is the "people to people" effort, with its community involvement, use of volunteers, and contributed services designed to promote mutual understanding and development in both Partner countries as well as to provide technical assistance and training, of a sufficiently high priority to warrant continued AID support?
- What are the prospects for the Partners becoming a strong, viable institution?
- Are AID and the Partners willing and able to invest the time, effort, and money in a collaborative program to create a mutually beneficial relationship?
- Does the Partners program provide an effective vehicle for U. S. volunteers, institutions, and the private sector to participate in an effective manner in the development process for LDC's at a minimal cost to the U. S. Government?
- Does the Partners program provide an effective vehicle for LDC volunteers, institutions, and local private sector groups to participate in the development process within their countries. If it does provide such a vehicle, is this then a desirable program for the U. S. Government to support?

In addition, AID has raised several questions of a policy character which will be treated in the body of the report and in a separate section. These include:

- the institutional basis of NAPA;
- continuity of AID funding; and
- activities in graduated countries.

## VI. STATE PARTNERSHIPS IN THE U. S.

### A. Introduction

A sample of eight U. S. Partners, somewhat skewed toward the more effective programs, was studied through onsite visits. The Partnerships studied were:

Georgia (Pernambuco, Brazil)	South Carolina (SW Colombia)
Illinois (Sao Paulo, Brazil)	Tennessee (Venezuela)
Kansas (Paraguay)	Utah (Bolivia)
Louisiana (El Salvador)	Wisconsin (Nicaragua)

These states represent almost one-sixth of the 46 Partnerships in 43 states and in 1975 received about one-third of the travel funds made available to NAPA by AID. They include some of the oldest and newest Partners, some of the largest and smallest development programs. They include a wide range of country economic levels and a wide geographic distribution in the U. S. as well as in Latin America. They include countries where AID has ongoing programs, where AID is entering a phase-out stage, and where the AID program has been terminated or graduated.

One member of the evaluation team visited each Partnership for approximately two days. Seven visits were made in December 1975 and one was delayed until the first week in January 1976. The visits followed earlier attendance at the annual NAPA conference in Albuquerque and interviews and analysis of records in the Washington offices of AID and NAPA.

During the visits, the evaluators attended three board meetings and interviewed 120 men and women including state chairpersons, board and committee members, and volunteers in the Partners program, and key officials in the state governments and state institutions. Evaluators made a point of visiting several sites within each state.

One conclusion from these visits is that the Partners' strength is out of proportion to its membership. This strength arises from small groups of dedicated officers and committee members who have been able to: (1) involve many organizations and institutions in activities in Latin America; (2) undertake projects that have caught the interest of the public and the press; and (3) stimulate the interest and personal involvement of key state officials who have been impressed with their achievements and potential.

Another conclusion from the study is that these accomplishments have been achieved at very low cost to the U. S. Government. In the eight Partnerships

studied, the average cost of AID-provided travel funds was \$12,251 (Table I - \$98,009 divided by 8). This money provided for 163 trips, an average of 20 per Partnership. Furthermore, this money generated payment from other U.S. and Latin American sources for an additional 127 trips, an average of almost 19 per Partnership, in development-related activities. Put another way, an AID investment of \$98,009 paid for 163 technical assistance and training visits, which generated an additional 127 trips at no cost to the government, and thus the eight Partners studied provided 290 visits at an AID cost of \$98,009 or an average cost to the U.S. Government of \$338 per trip. For purposes of comparison, the U.S. Government's investment in one of the eight Partnerships, \$12,251, is less than the cost of sending two AID consultants to Latin America for about two months. This is based on an assumed daily salary rate of \$100 a day per consultant for 44 working days, per diem for 50 calendar days at \$35 per day, and round-trip air fare of \$500, or \$6,650 per consultant and a total for two consultants for two months of \$13,300.

In the following sections we shall address the specific questions raised in the scope of work.

B. Extent of local and state-wide participation in the Partnerships as well as the degree of viability and effectiveness of the Partnerships

1. Participation

a. Findings

Numbers: Precise figures are not available on the number of members in the Partnerships, but at best the number of dues-paying members is small. Georgia has about 70 dues-paying members; Illinois 35-40; Kansas about 40.

Tennessee estimates its membership at 200-500 but the lists were just being culled by a new membership chairperson. Louisiana, one of the strongest partners, has around 100 active members, and Utah about 50.

Beyond the circle of very active members (the state chairperson, other officers and committee chairpersons, and some committee members) who pay dues in some states, there are, in fact, ever widening circles of Partners. From the point of view of technical assistance and training, perhaps the most important participants are the volunteer technicians. In FY 1975, in the eight Partnerships studied, 290 volunteer-technicians, in categories related to development, had their travel paid from all sources. This includes

163 paid in whole or in part from AID supplied funds. Incidentally, some of the state Partners are considering asking all volunteer technicians to become dues-paying members.

Participation extends beyond the individuals who travel. Many of the volunteers are employed by institutions, e. g., state universities, which participate in the planning for the project and in follow-up activities, often over a period of years. Their participation, of course, takes the form of continuation of the salary and other entitlements while the volunteer is engaged in Partner activities, estimated for these eight Partnerships in FY 1975 at \$874,410 for categories related to development.

There is another type of participation--functional--health, educational, agriculture, etc. To meet criteria established by NAPA, each state Partnership has a committee structure covering at least two major areas in the Partners developmental program as well as the non-developmental activities. Each committee draws heavily on state resources in its area of specialization and has quite a free hand in developing programs and projects with its counterpart committee in the Latin American Partnership. Projects in fact are usually developed by committee chairpersons and their volunteer specialists subject to approval by the Partner chairperson in Latin America and the U. S.

The evaluation team found that the extent of functional participation is dependent on a number of factors, among them: the interest and drive of the committee chairpersons and the amount of pushing by the state chairperson; the interest and needs of the Latin American Partner in that field of activity; the interest and willingness of key individuals in various institutions in participation in that aspect of the program; the interest of key state officials, e. g., the governor, in pushing particular aspects of the program.

The extent of functional participation is further affected by the activities of NAPA staff. Seminars and workshops, such as the PREP (special education and rehabilitation) workshop in 1972, has stimulated considerable participation in this area by FY 1975. Presumably the rural development and rural health workshops held early in 1975 will begin to show increased agricultural activity beginning in FY 1976. Arrangements with national organizations, such as Goodwill Industries and the Heart Association, worked out by NAPA, extend areas of participation as do descriptions of project activity in the newsletter. A most important effort at broadening functional participation comes about also through the field visits

of NAPA staff who can often get state and committee chairpersons to meet with state specialists who can open up new areas of activity.

The Partners have used various membership devices. Some of the states have had modest membership campaigns, and contributors are members. In Georgia the 300 people a year who participate in the trip to Pernambuco or who host Pernambucan families visiting Georgia are part of the Partners complex. In Tennessee members of a high school band that performed in Venezuela are considered junior Partners.

Another level of participation or exposure is reflected in the thousands of children in Utah who heard performances of Bolivian folk music in their schools arranged by the Bolivian and Utah Partners in appreciation for their fund raising program which is helping the Bolivians build 62 schools in rural areas. In a somewhat parallel type of exposure, thousands of South Carolinians watched a Colombian folk dance program on the state-wide educational TV network following the taping of the original performance, all part of a carefully designed project on the part of a newly established Partnership to create awareness and interest in Southwest Colombia.

There is a further level of indirect participation: those who read about Partner activities in the press or hear about them on radio and TV. Millions of people who might read a few paragraphs about foreign policy or economic development, hear or read about the personalized activities and impressions of foreign visitors, volunteers, and cooperating institutions. There is no way of measuring this participation without in-depth studies, except to read it in press clippings and/or to examine relative news coverage of Partner activities in rural as well as urban areas. One thing is clear-- the Partners are news.

b. Recommendations

(1) Membership System and Statistics

- (a) The NAPA board and executive committee should make a special effort to improve the system of records and statistics relating to members and contributors. The system should also reflect varying types of participation and exposure such as the Georgia-Pernambuco citizen exchange and the Utah and South Carolina examples cited above. This type of information is essential for the state Partners in judging progress in expansion of participation as discussed below and for use by the state Partners and NAPA in discussions with present and prospective donors.

- (b) To insure that the system is realistic and acceptable to volunteers, it should be developed by a task force selected by the executive committee from individuals in the state Partners who are interested in records and statistics. It should include one or two volunteers who are statistical reporting specialists familiar with voluntary programs. Because of its need for data and familiarity with problems in many of the Partners, NAPA staff should participate on the task force. The report of the work group should be ready for discussion at the next NAPA annual conference.

(2) Membership Base

- (a) The state Partners should expand membership geographically to include all areas of the state, and functionally to provide added technical resources for economic and social development through the Partnerships. Such expansion will make it possible to involve more people and institutions in "people to people" programs, draw on talent not now being utilized, and establish a broader base for the dues and contributions needed for Partnership operations.
- (b) Concurrently, a task force selected by the executive committee from state Partners, with assistance from NAPA staff, should examine the policy, program, and financial aspects of membership expansion as well as operational problems arising from experience in implementation of the foregoing recommendations; e. g., problems of communication and coordination when committee chairpersons and board members are in distant parts of the state; possible need for a geographic as well as a functional structure and the relationships between the two; added administrative costs that go with expansion and how those might be met; need for paid staff and sources of funding. This examination should take into account the uncertainty of continued AID funding and possible implications for relationships between NAPA and the state Partners. The task force should report its findings and recommendations for discussion at the next annual conference.

## 2. Viability

### a. Findings

The narrow membership base and the discussion of means of broadening the base should not distract attention from the great strengths of the Partners which bear on their viability--their ability to undertake activities of interest and concern to the people of their state and their Latin American Partner, to involve other organizations and institutions, to interest civic leaders in the program, to mobilize resources at minimal cost, to move forward after loss of momentum, to survive changes (sometimes traumatic) of leadership, to maintain their commitment in the face of obstacles and competing demands.

Our findings suggest several factors that contribute to this viability of the Partners:

- Partners are part of a deep-seated American tradition of people who believe in hard work to improve the lot of the poor and somewhat of a missionary zeal in helping those abroad;
- In at least five of the eight states the Partners reinforce or support strong state interests. Foreign trade, for example, is a particularly strong interest in Louisiana, Illinois, and South Carolina; the Mormon Church in Utah; the enrichment of the state university, professionally and culturally, as well as financially, in Tennessee;
- The strong personal ties with a particular country or area that have been built over a period of ten years;
- The contribution of Partnership activities to people and institutions of the state. For example, the medical school of the University of Tennessee finds that work in Venezuela provides some of the same stimulus and new experience as a sabbatical; several Partners, with support from the Bureau of Educational and Cultural Affairs of the Department of State, are developing curricula on the Partner country for enrichment of public school education; the incentive of trips to the Partner country for demonstration and assistance has served as a stimulus for coaches, athletic teams, and civic organizations like the Girl Scouts. There has been infusion of new cultural interests through the presentations of folk music and dance groups and artists-in-residence.

These and many other elements contribute to the viability of the Partners, and at the same time contribute to one of the primary objectives of the Partners, promotion of better understanding between the United States and Latin America.

At the same time, in the assessment of viability, the importance of NAPA and the AID-provided travel funds, and the assistance of NAPA staff cannot be overlooked.

Membership in NAPA provides a sense of hemisphere identification, guidance, and a helping hand in rebuilding the Partnerships. Identification comes through the newsletter, the annual conference workshops, publicity, and the like. The guidance comes from actions of the board and executive committee, as well as the work of the NAPA staff. The same is true of periodic rebuilding. As mentioned previously, the Partners, like most voluntary organizations, ebb and flow with changes in leadership. Some, like Tennessee a few years ago, rebuild from within, but in others NAPA staff may be influential in the selection of a new state chairperson and in providing guidance during the reformation of the board and committees.

The incentive of travel money provided from AID through NAPA has some bearing on the viability of the state Partners. This money, used frugally, paid for an average of about 20 development-related trips per Partnership in 1975. Even though almost every volunteer must pay for some costs from his own pocket, these funds made it possible for some volunteer technicians to provide service in Latin America who could not otherwise have afforded to go abroad. They provided the incentive for the Partners to open up activities within the guidelines which might otherwise have been ignored, such as the participation in 1975 in the workshops in Central America on agriculture and rural health. These funds also induced individuals and institutions in the U. S. and Latin America to provide volunteer services and funds from their own or other resources to meet the full costs of activities in Latin America.

A further factor bearing on viability is the personal involvement in Partners activity of people of prestige and influence in the state. The former Governor of Georgia visited Pernambuco; the Governors of South Carolina and Tennessee are planning visits to their Latin American Partners this spring; El Salvador Partners have met with the Governor of Louisiana; the president of the University of Wisconsin and the state directors of administration of Wisconsin and Louisiana are all active in the Partners.

Our assessment is that the majority of the state Partners are viable institutions because of the dedication of their leadership group, their sense of identification with their Latin American Partner and the interests of their state, and the degree of public interest and support they generate. All of the Partners would be shaken by the withdrawal of external financing of technician travel or curtailment of NAPA guidance and identification. Some would survive because of internal strength and the interests of the public and private sector with the state. How much of their interest would continue to focus on development is conjectural. This would depend on whether they could find donors who would support development, or whether support would come more easily for the more popular "people to people", sports, and cultural activities.

b. Recommendations

- (1) While working toward the broadening of the membership base discussed above, the state Partners should make special efforts to involve: more state institutions, individuals and corporations especially in agriculture, nutrition, and industry, who can provide untapped resources for technical assistance and training; the Spanish and Portuguese speaking community who can help bridge cultural and communication gaps as well as provide specialized expertise; retired executives and specialists; etc. The active involvement of more of the states' human resources will broaden state interest, contribute more to public education in problems of development, broaden the field of selection for Partnership leadership, and give greater assurance of continuity of Partner programs as it will be possible to respond to new interests as old ones lag. Viability will be further increased by broadening the base for financial support by expanding the source of dues and contributions, and contacts with potential donors, while still preserving the Partners' strength as essentially groups of dedicated professionals whose influence is far greater than their wealth.
- (2) Concurrently, a task force of some state Partners, with inputs from NAPA and AID, should examine the question of viability and report for discussion at the next annual conference. Among the questions that should be considered, in addition to membership, are the problems of revival of near-dormant Partnerships, prospects for increased local funding, and alternatives for NAPA and volunteer travel funding, given the uncertainty of continuity of AID financial support.

- (3) Following the report of the task force and discussion at the next annual conference, AID should reexamine its position to see whether the progress made and actions taken by the Partners should in any way affect its continued relationships with and financial support for the Partners.

### 3. Effectiveness

#### a. Findings

One of the principal problems in evaluating the effectiveness of the state Partners in the United States is the lack of criteria for judging effectiveness. A year ago the NAPA board of directors established 11 standards (Annex II ) for the structure and operation of the state Partners. These are good standards and the executive committee was instructed to develop a program to assist the state Partners in meeting those standards.

They do not, however, go far enough, in the judgment of the evaluators, in establishing criteria for judging the effectiveness of the state Partners, particularly from the point of view of the principal donor, AID.

Although the evaluators believe strongly that criteria should be developed among the parties concerned, (in this case, NAPA, state Partners and AID), we have developed a set of working criteria for use in this report and which, we hope, can become the takeoff point for a consensus among the parties concerned.

Working criteria and commentary follow.

- (1) Continuity of leadership. Given the voluntary nature of the program, this criterion would include a leadership group large enough to provide for program continuity and introduction of new blood as well as the capacity, when needed, to survive traumatic changes of leadership. We believe all eight studied meet this criterion, but the base for leadership development would be improved by broadening the program and membership base.
- (2) An innovative leadership group of dedicated and committed men and women seeking ways to draw on the resources of the state for social and economic purposes in Latin America, and for

using the resources of the Latin American Partner for parallel development in the United States. We believe all eight Partners studied met this criterion, but as in (1) above, with a broader program and membership, there would be a larger group from which to draw.

- (3) A broad geographical base to assure participation in Partner programs and activities in all parts of the state. Although the majority of the partners studied drew their leadership from a number of cities, none has come close to comprehensive state-wide participation.
- (4) A broad functional base to assure that key program areas and institutions important to development have an opportunity to participate in the program, and that state resources in these areas are effectively utilized. Although the programs have shifted significantly toward social and economic development during recent years, none has as yet drawn fully on state resources. None has drawn fully on the resources of the business community, the Spanish (Portuguese) speaking community, institutions and individuals concerned with agriculture, nutrition, or broad health services for the very poor.
- (5) Sensitivity to cultural differences between the U. S. and Latin America as applied in operational relationships. Although all the state Partners pride themselves on their good relationships with their Partners, the Latin American Partners are disturbed by delays and breakdowns in communication or what they consider slights to their status as equal Partners. Only in El Salvador-Louisiana did we find indicators of full equality between the U. S. and Latin American Partners.
- (6) Understanding of U. S. programs and objectives in Latin America None of the Partners had been provided with background information by the Department of State or AID which could be helpful in establishing a context for their developmental and other programs. Some of the Partners had more cooperative relationships with the Embassy of their Partner country than they did with State or AID.
- (7) Stimulating interest and personal involvement of key state officials like the governor, key legislators, etc. All of the Partnerships have been effective in getting key state figures to play an active role, from time to time, in the Partners

program, and to give the program their personal backing when needed. Two of the eight studied had received some financial support from the state government.

- (8) Planning and implementing projects related to development, particularly in the areas of the AID guidelines. All of the Partnerships have developed and provided technical assistance and training in areas related to development. Although there has been a remarkable shift over the past two years toward increased developmental activities, the major orientation toward agriculture started in 1975 and will not begin to show up significantly in projects before FY 1976. Furthermore, the U. S. and Latin American Partners had received little or no guidance from AID beyond the bare bones material in the grant to NAPA. Nevertheless, the evaluators estimate that about 78 percent of the projects undertaken in the last few years have been of benefit to Latin America's development; with better guidance they can function in areas of higher priority. Furthermore, joint planning with the Latin American Partners, still in an early stage, will result in further improvement.
- (9) Performance at minimal cost. Because administrative activities are handled by volunteers rather than paid staff, operational costs in all eight Partners were minimal, below needs in some cases. Even though potential had not been realized, the effectiveness of the Partners in drawing on state resources for volunteer technicians has provided technical assistance and training far below the costs of services by the U. S. Government.
- (10) Fund Raising. The state Partners generally lacked adequate funds for program administration and had made little organized effort to raise these needed funds. On the other hand, all of the Partners were able, without undue difficulty, to obtain contributions of the services of volunteer technicians, and to obtain from a variety of sources the funds needed to finance their travel. However, none of the Partners has fully explored the possibilities of additional funding from business and government within the state, or mounted efforts that could begin to meet some of the costs of NAPA staff services or the travel of volunteers.

b. Recommendations

- (1) NAPA should set up a task force of individuals from various state Partners, one or two Latin American Partnerships, and NAPA and AID to begin the development of further guidelines for judging effectiveness of the state Partnerships. The task force should prepare a report for discussion at the next annual NAPA conference. Because of the complexity of the task and the divergent views expected, it is presumed that the task force would continue and report further at the following annual conference.

Even if specific guidelines are adopted only after several years of effort, the process of considering criteria will help materially in shaping the program and may help to give the state Partners an increased program development perspective rather than largely ad hoc response to targets of opportunity.

C. Number and Scope of Projects Conducted Annually

1. Findings

- a. There is no way to determine accurately the number of projects both because primary records are not kept by projects and because of various problems in the way the Partners program operates. Among them:
  - There is no uniform definition of a project. A project may vary from a single visit by one or two technicians to a series of related visits over a period of years, or a project may be a trip by a half dozen or so committee chairpersons and specialists which may open up activities or projects in a number of subject matter fields.
  - Although activities are described in project terms, records are maintained by Partnership and trips.
  - It is not possible to reconstruct project activity from records maintained by trips because NAPA uses AID-supplied funds as seed money, and subsequent trips to the Latin American Partner or to the U. S. Partner are often financed from non-AID sources.

- The Partners, using AID supplied funds, often initiate projects in collaboration with local or U.S. institutions, e.g., the Association of Venezuelan Volunteers or Goodwill Industries. These projects often continue for years with varying degrees of Partners' involvement as they are partly Partners projects and partly projects of collaborating organizations.
  - Some of the Partners have been instrumental in setting up sister city programs, e.g., Oak Ridge, Tennessee, and Barquisimeto, Venezuela, and it is difficult to sort out sister city and Partner activities.
- b. NAPA reported 841 projects for the year ending June 30, 1975, on its Supplement to Schedule C-100 Statement of Income and Expenditures. Based on our cross-section, there were probably around 200 projects in the eight states studied, but we cannot be confident of the figures because of the problems cited above.
- c. The evaluators examined 62 projects in the U.S. and Latin America, encountering many of the difficulties mentioned above, and studied in some depth the 46 projects summarized in Annex III.
- d. Far more significant are the scope and impact of many of the projects. Some examples:
- Agreements between the Georgia University systems and Pernambuco for upgrading of agriculture through a masters program, and assistance in strengthening linkages between research and extension to be financed by the participating institutions;
  - Fund raising by Utah school children, along with study of Bolivia, to assist Bolivians in construction of 62 rural schools;
  - Technical assistance which lead to reorganization of a clinic for mentally retarded children in Cali, introduced modern testing and teaching methods and made it possible to develop out-reach programs for parents of retarded children who must be cared for in their homes without professional help;
  - A state of Illinois trade office opened in Sao Paulo as a direct result of Partners activity;

- The University of Tennessee - Martin (5300 students) which had a purely domestic focus, has now become a center for international training as the result of Partners' efforts in getting University of Tennessee-Martin to set up a program in English language training for about a dozen Venezuelan students, a group now grown to 125 whose tuition and expenses are paid by Venezuela.
- A rural health program, initiated and assisted by the Partners, is providing health services through six rural clinics and 35 rural community health centers to thousands of rural people on the isolated east coast of Nicaragua. It is also providing research and training for American graduate students and Nicaraguan medical students.
- Joint planning lead to the training over a four-year period of all the personnel to staff a new intensive care unit in El Salvador's social security hospital.

These are illustrative of the scope and impact of many projects, particularly newer ones, where increased attention has been given to results. Many of the older projects, especially those involving transfer of used equipment, were localized in scope and impact.

The cited projects illustrate what can be done with limited resources and volunteers after careful joint planning. NAPA contributed significantly to these goals at the November Albuquerque meeting by distributing a guide to project planning developed by Dr. Ned Wallace of the Wisconsin Partners.

The impact of projects will be discussed in greater detail in the treatment of the Latin American Partners.

## 2. Recommendations

- a. A task force of state Partners, with some input from AID and NAPA staff, should examine the subject of project definition and reporting, and submit its findings and recommendations for consideration at the next annual conference.
- b. NAPA should encourage more attention to program and project planning by following up on the guidelines developed by Dr. Ned Wallace to make sure they are considered by all U. S. and Latin American Partners.

- c. NAPA should go beyond the issuance of the AID guidelines as a basis for travel approval, and supplement them with guidance on program substance. This, of course, will require collaboration from AID;
- d. For other recommendations, see section relating to NAPA.

D. Ability and Willingness of Partnerships to Promote, Develop, and Implement Self-help Projects of a Socio-economic Development Nature with Special Emphasis on AID Guidelines

1. Findings

- a. All the U.S. Partners are moving in the direction of increased attention to developmental activities in response to NAPA leadership, but none has come close to tapping fully the resources for development available to the Partnerships. Indicative of the growing emphasis on development is the fact that 163 of 181 trips funded by NAPA during FY 1975 for the Partners studied were broadly in the area of development.

NAPA Funded Trips During FY 1975

Agricultural Technicians	10	Community Workers	16
Medical Specialists	26	Rehabilitation Specialists	33
Educators	53	Partners Officers	25

The low figure on agriculture suggests a fairly common lag in project development. Whereas the 33 rehabilitation specialists result from a seminar on rehabilitation and special education in 1972 and active followup by NAPA, the first seminars on rural development were held early in 1975 followed by the panel on agriculture at the Albuquerque conference in November 1975. Consequently, an upward trend in agriculture should begin to show in FY 1976.

- b. AID's concern for socio-economic development and service to the poor majority is generally known to the Latin American Partners who must be a party to all projects and who must approve travel requests before they will be considered by NAPA. However, the Latin American Partners have not received the AID guidelines because NAPA staff maintains its jurisdiction is limited to the U.S. Partners and no one suggested that the U.S. Partners relay

them to their Latin American Partners. The problem is compounded further by little or no AID dialogue with the Partners. On the one hand the Partners are loathe to get too deeply involved with government; and on the other the AID missions are unsure of what their role should be, considering the voluntary nature of the Partners. The situation is somewhat different in Brazil where the association of the 19 Brazilian Partners, now receiving funds from the Brazilian Planning Board, still feels close to the AID mission which helped support it for a number of years.

- c. Beyond the bare bones guidelines incorporated in the grant and conveyed by NAPA to the U. S. Partners, we found nothing to indicate that AID's concerns for the substantive aspects of socio-economic development had been conveyed directly to the Partners except by recent visits of mission personnel to South Carolina, Georgia, and Illinois, and the major input of AID to the Albuquerque conference in November. The NAPA newsletter does describe various social and economic development projects, and 14 Partners participated in the agricultural workshop with NAPA followup on field visits and by phone, but a lag in acceptance and implementation is normal in any organization, particularly so in an organization of volunteers where there is no chain of command.
- d. In every Partnership there appeared to be a sincere conviction that most of their work was in the area of social and economic development. They all expressed an interest and willingness to do more, but expressed some uncertainty in moving into new areas, e. g., "our Partner country is not interested in agriculture"; "our agriculture school's budget has been cut so I'm sure they wouldn't be interested." On the other hand, the evaluators found one large agriculture school with serious budget problems willing and anxious to participate by releasing staff members for up to one month at full pay, provided the university did not have to make cash outlays. In some instances the problem has been resolved by the NAPA staff person taking the state chairperson to meet the dean of the agricultural school and from there the project develops.
- e. Despite these problems, Tables I, II, and III demonstrate that--
  - 78 percent of 46 projects studied in some depth were responsive to three or more of the five AID guidelines;
  - 10 out of 14 new or revitalized projects address four or more of the AID guidelines;

- \$85,354 for volunteer travel was generated from other U. S. and Latin American sources;
- AID's investment of \$98,009 in these eight Partnerships generated \$874,410 in the value of the services of volunteer technicians. (See Tables I, II, III on following pages.)

## 2. Recommendations

- a. NAPA and AID should jointly sponsor a series of workshops on program and project development, with particular emphasis on socio-economic development and the type of activities most appropriate for a voluntary organization like the Partners. Emphasis should be placed in drawing on experience with existing programs. Particular attention should also be given to clarification of relationships within the Partners' structure and relationships with AID. The subject of project planning could be built around the guidelines presented by Dr. Ned Wallace at the Albuquerque meeting.
- b. AID should make appropriate information available to the U. S. Partners on its programs in general and the programs in each of the Partners' countries. AID should go beyond present guidance and encourage mission directors and ambassadors to visit the Partners, whenever convenient, for a sharing of views and experience.
- c. AID should issue guidance for its missions in dealing with the Partners.
- d. NAPA staff should be requested to send the AID guidelines to the Latin American Partners or to have them relayed by the U. S. Partners.

## E. Access to Private Funding and Other Support of Projects

### 1. Findings

- a. Although the U. S. Partners have been generally successful in obtaining support for projects, the evaluators believe it will be more meaningful to respond to this question in relation to various categories of funding.

STATE PARTNERSHIPS

NAPA Sponsored and Other Sponsored Travel - FY 1975

PARTNERSHIP	GRAND TOTALS		TOTALS* AID Related		Disaster Experts*		Agricultural Technicians*		Medical Specialists*		Educators*		Community Workgrs*		Rehabilitation Specialists*		Partner Officers*		Government Officers		Business & Trade*		TOTALS Non-AID Related		Sports, Coaches Athletic		Cultural Artists		High School Students		University Students		Tourists		Other Technicians			
	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips		
GEORGIA - PERNAMBUCO (N)	12,560	15	12,235	14	-0-	-0-	2,540	2	1,250	-1	975	3	1,017	1	5,203	6	1,250	1	-0-	-0-	-0-	-0-	325	1	325	1	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(O)	238,557	311	15,066	18	-0-	-0-	1,674	2	-0-	-0-	1,674	2	-0-	-0-	2,511	3	3,348	4	3,348	4	2,511	3	223,491	293	837	1	26,784	32	8,370	10	-0-	-0-	187,500	250	-0-	-0-		
Subtotal Georgia	251,117	326	27,301	32	-0-	-0-	4,214	4	1,250	1	2,649	5	1,017	1	7,714	9	4,598	5	3,348	4	2,511	3	223,816	294	1,162	2	26,784	32	8,370	10	-0-	-0-	187,500	250	-0-	-0-		
ILLINOIS - SAO PAULO (N)	11,694	11	7,139	6	-0-	-0-	-0-	-0-	-0-	-0-	1,266	1	1,172	1	4,701	4	-0-	-0-	-0-	-0-	-0-	-0-	4,555	5	3,309	4	1,246	1	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-		
(O)	67,776	77	8,504	8	-0-	-0-	1,063	1	1,063	1	-0-	-0-	-0-	-0-	3,189	3	1,063	1	2,126	2	-0-	-0-	59,272	69	44,646	42	12,500	25	1,063	1	-0-	-0-	1,063	1	-0-	-0-		
Subtotal Illinois	79,470	88	15,643	14	-0-	-0-	1,063	1	1,063	1	1,266	1	1,172	1	7,890	7	1,063	1	2,126	2	-0-	-0-	63,827	74	47,955	46	13,746	26	1,063	1	-0-	-0-	1,063	1	-0-	-0-		
KANSAS - PARAGUAY (N)	12,877	11	10,647	9	-0-	-0-	4,773	4	-0-	-0-	1,220	1	-0-	-0-	4,654	4	-0-	-0-	-0-	-0-	-0-	-0-	2,230	2	982	1	1,248	1	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-		
(O)	1/																																					
LOUISIANA - EL SALVADOR (N)	18,653	58	18,364	57	-0-	-0-	321	1	2,065	7	10,207	29	-0-	-0-	3,603	12	2,168	8	-0-	-0-	-0-	-0-	289	1	289	1	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-			
(O)	43,667	118	18,309	47	-0-	-0-	-0-	-0-	3,852	12	2,568	8	-0-	-0-	-0-	-0-	1,605	5	1,284	4	3,000	18	25,358	71	7,824	16	-0-	-0-	7,704	24	200	1	9,630	30	-0-	-0-		
Subtotal Louisiana	62,320	176	36,673	104	-0-	-0-	321	1	5,917	19	13,775	37	-0-	-0-	3,603	12	3,773	13	1,284	4	3,000	18	25,647	72	8,113	17	-0-	-0-	7,704	24	200	1	9,630	30	-0-	-0-		
So. CAROLINA - SW COLOMBIA (N)	6,254	13	6,254	13	-0-	-0-	-0-	-0-	756	2	-0-	-0-	-0-	-0-	1,110	2	4,388	9	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-			
(O)	6,975	15	2,325	5	-0-	-0-	465	1	-0-	-0-	465	1	-0-	-0-	-0-	-0-	465	1	465	1	465	1	4,650	10	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	1,395	3	2,790	6	465	1
Subtotal So. Carolina	13,229	28	8,579	18	-0-	-0-	465	1	756	2	465	1	-0-	-0-	1,110	2	4,853	10	465	1	465	1	4,650	10	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	1,395	3	2,790	6	465	1
TENNESSEE - VENEZUELA (N)	15,750	26	12,684	21	-0-	-0-	-0-	-0-	3,756	7	4,344	7	-0-	-0-	3,432	5	1,152	2	-0-	-0-	-0-	-0-	3,066	5	2,355	4	711	1	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-		
(O)	64,742	138	2,052	2	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	2,052	2	-0-	-0-	-0-	-0-	62,690	136	5,700	8	-0-	-0-	28,590	57	28,400	71	-0-	-0-	-0-	-0-		
Subtotal Tennessee	80,492	164	14,736	23	-0-	-0-	-0-	-0-	3,756	7	4,344	7	-0-	-0-	3,432	5	3,204	4	-0-	-0-	-0-	-0-	65,756	141	8,055	12	711	1	28,590	57	28,400	71	-0-	-0-	-0-	-0-		
UTAH - BOLIVIA (N)	16,108	21	14,052	17	-0-	-0-	1,182	1	1,182	1	7,586	9	2,529	3	-0-	-0-	1,573	3	-0-	-0-	-0-	-0-	2,056	4	2,056	4	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-			
(O)	69,580	70	27,832	28	-0-	-0-	3,976	4	2,982	3	12,922	13	2,982	3	1,988	2	994	1	1,988	2	-0-	-0-	41,748	-0-	15,904	16	19,880	20	-0-	-0-	1,988	2	3,976	4	-0-	-0-		
Subtotal Utah	85,688	91	41,884	45	-0-	-0-	5,158	5	4,164	4	20,508	22	5,511	6	1,988	2	2,567	4	1,988	2	-0-	-0-	43,804	4	17,960	20	19,880	20	-0-	-0-	1,988	2	3,976	4	-0-	-0-		
WISCONSIN - NICARAGUA (N)	16,634	26	16,634	26	-0-	-0-	232	2	5,047	8	1,642	3	8,224	11	-0-	-0-	1,489	2	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-			
(O)	45,480	71	12,160	19	-0-	-0-	3,204	5	2,560	4	1,280	2	2,560	4	-0-	-0-	-0-	-0-	1,920	3	640	1	33,320	-0-	15,360	24	640	1	1,960	3	1,920	3	11,520	18	1,920	3		
Subtotal Wisconsin	62,114	97	28,794	45	-0-	-0-	3,432	7	7,607	12	2,922	5	10,784	15	-0-	-0-	1,489	2	1,920	3	640	1	33,320	-0-	15,360	24	640	1	1,960	3	1,920	3	11,520	18	1,920	3		
TOTAL THESE PROJECTS (N)	110,530	181	98,009	163	-0-	-0-	9,048	10	14,056	26	28,196	53	12,942	16	22,703	33	12,020	25	-0-	-0-	-0-	-0-	12,521	18	10,126	15	4,172	3	-0-	-0-	-0-	-0-	-0-	-0-	-0-			
(O)	536,777	800	85,354	127	-0-	-0-	10,378	13	10,457	20	17,953	26	5,542	7	7,688	8	9,589	14	11,131	16	12,616	23	90,271	107	59,804	78	47,687	95	33,903	80	216,479	309	2,385	4				
TOTAL ALL PROJECTS (N)	360,810	609	310,094	529	1,786	4	40,600	59	58,654	124	59,960	96	21,891	33	57,288	85	65,675	123	-0-	-0-	4,238	5	50,716	80	31,346	48	19,370	32	-0-	-0-	-0-	-0-	-0-	-0-				
(O)	1,687,829	2,765	399,788	606	2	46,765	54	59,972	111	70,647	93	42,114	90	46,336	58	45,695	81	39,615	47	47,564	70	1,288,042	2,159	150,303	233	225,058	419	215,783	313	329,261	587	361,725	599	5,914	10			
% OF TOTAL (N)	31.7%	30.4%			-0-	-0-	22.3%	16.9%	24.0%	21.0%	47.0%	56.2%	59.1%	48.5%	39.6%	38.8%	19.7%	21.1%	-0-	-0-	-0-	-0-			32.3%	20.6%	21.5%	12.5%	-0-	-0-	-0-	-0-	-0-	-0-				
(O)	31.8%	28.9%			-0-	-0-	22.2%	24.1%	17.4%	18.0%	26.8%	28.0%	13.1%	7.8%	16.6%	13.8%	20.8%	17.2%	28.1%	34.0%	26.5%	32.9%			60.1%	45.9%	26.6%	18.6%	22.1%	30.5%	10.3%	13.6%	59.8%	51.6%	40.3%	40.0%		

N = NAPA Sponsored  
O = Other Sponsored

1/ No "Other Sponsored" Travel Reported.

TABLE II  
STATE PARTNERSHIPS-VALUE OF TECHNICAL SERVICES  
FY 1975

PARTNERSHIP	TOTAL Tech. Services		TOTAL AID Related		Disaster Exp. <sup>1/</sup> (\$75x20=\$1,500)		Ag. Techs. (\$75x36=\$2,700)		Med. Specs. (\$150x36=\$5,400)		Educators (75x36=\$2,700)		Comm. Wkrs. (\$75x24=\$1,800)		Rehab. Specs. (\$75x30=\$2,250)		Partner Officers (\$80x48=\$3,840)		Gov't Officers (\$60x24=\$1,440)		Business & Trade (\$60x24=\$1,440)		TOTAL Non-AID Related		Sports Coaches & Athletics (\$75x20=\$1,500)		Cultural Artists (\$65x20=\$1,300)		High School Students		University Students		Tourists		Others (\$60x24=\$1,440)			
	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips	Amount	Trips		
	GEORGIA - PERNAMBUCO	127,070	326	82,470	32	-0-	-0-	10,800	4	5,400	1	13,500	5	1,800	1	20,250	9	19,200	5	5,760	4	5,760	3	44,600	294	3,000	2	41,600	32	-0-	10	-0-	-0-	-0-	250	-0-	-0-	
ILLINOIS - SAO PAULO	137,870	88	35,070	14	-0-	-0-	2,700	1	5,400	1	2,700	1	1,800	1	15,750	7	3,840	1	2,880	2	-0-	-0-	102,800	74	69,000	46	33,800	26	-0-	1	-0-	-0-	-0-	1	-0-	-0-		
KANSAS PARAGUAY	25,300	11	22,500	9	-0-	-0-	10,800	4	-0-	-0-	2,700	1	-0-	-0-	9,000	4	-0-	-0-	-0-	-0-	-0-	-0-	2,800	2	1,500	1	1,300	1	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
LOUISIANA - EL SALVADOR	347,940	176	322,440	104	-0-	-0-	2,700	1	102,600	19	99,900	37	-0-	-0-	27,000	12	49,920	13	5,760	4	34,560	13	25,500	72	25,500	17	-0-	-0-	-0-	24	-0-	1	-0-	30	-0-	-0-		
So. CAROLINA - SW COLOMBIA	63,900	28	62,460	18	-0-	-0-	2,700	1	10,800	2	2,700	1	-0-	-0-	4,500	2	38,400	10	1,440	1	1,920	1	1,440	10	-0-	-0-	-0-	-0-	-0-	-0-	3	-0-	6	1,440	1	-0-	-0-	
TENNESSEE - VENEZUELA	102,610	164	253,410	23	-0-	-0-	-0-	-0-	37,800	7	189,000	7	-0-	-0-	11,250	5	15,360	4	-0-	-0-	-0-	-0-	31,000	141	18,000	12	1,300	1	-0-	57	-0-	71	-0-	-0-	-0-	-0-		
UTAH - BOLIVIA	184,040	91	128,040	45	-0-	-0-	13,500	5	21,600	4	59,400	22	10,800	6	4,500	2	15,360	4	2,880	2	-0-	-0-	32,600	46	30,000	20	2,600	20	-0-	-0-	-0-	2	-0-	4	-0-	-0-		
WISCONSIN - NICARAGUA	179,740	97	138,120	45	-0-	-0-	18,900	7	64,800	12	13,500	5	27,000	15	-0-	-0-	7,680	2	4,320	3	1,920	1	41,620	52	36,000	24	1,300	1	-0-	3	-0-	3	-0-	18	4,320	3	-0-	-0-
TOTAL THESE PROJECTS	1,168,470	981	874,410	290	-0-	-0-	62,100	23	248,400	46	213,300	79	41,400	23	92,250	41	149,760	39	23,040	16	44,160	23	294,060	691	183,000	122	105,300	81	-0-	95	-0-	80	-0-	309	5,760	4	-0-	-0-
TOTAL ALL PROJECTS	4,656,490	3,374	3,634,290	1,135	9,000	6	305,100	113	1,269,000	235	513,000	189	221,400	123	321,750	143	783,360	204	67,680	47	144,000	75	1,022,200	2,239	421,500	281	586,300	451	-0-	311	-0-	587	-0-	599	14,400	10	-0-	-0-
% OF TOTAL	25.3%	29.2%			-0-	-0-	20.4%	20.4%	19.6%	19.6%	42.1%	42.3%	18.7%	18.7%	28.7%	28.7%	19.6%	19.6%	34.0%	34%	30.7%	30.7%			43.8%	43.8%	18.2%	18.2%	-0-	30.5%	-0-	13.6%	-0-	51.6%	40%	40%		

<sup>1/</sup> Basis for estimating: Estimated average salary for category times average number of days for category including planning, travel and follow-up.

TABLE III  
RESPONSIVENESS AND EFFECTS OF PARTNERS PROJECTS

PARTNERS AND PROJECTS	AID GUIDELINES ADDRESSED					RESULTS			
	Develop Capacity Meet Needs	Continuous Program Benefit Large Numbers	Address Needs Low Income Groups	Address Most Basic Human Needs	Address Needs Large Numbers at Low Cost	Benefit LA Country	Too Soon to Judge	No Appreciable Results	Benefit Primarily US Partners
<u>BOLIVIA - UTAH</u>									
Rural School Construction	✓	✓	✓	✓	✓	✓			
Community Education	✓	✓	✓	✓	✓		✓		
Dental Services	✓	✓	✓	✓	✓	✓			
Agricultural School	✓	✓	✓	✓	✓			✓	
<u>BRAZIL (PERNAMBUCO) - GEORGIA</u>									
Rehabilitation -Special Education	✓	✓	✓	✓	✓	✓			
Federal Rural University	✓	✓	✓	✓	✓		✓		
Extension Service	✓	✓	✓	✓	✓		✓		
Vocational Education - Agriculture	✓	✓	✓	✓	✓		✓		
Federal University-Pernambuco	✓	✓		✓	✓		✓		
Citizen Exchange									✓
<u>BRAZIL (SAO-PAULO) - ILLINOIS</u>									
Drug Education	✓	✓	✓	✓	✓	✓			
Nurse Training/Education	✓	✓	✓	✓	✓		✓		
Illinois Bicentennial Week	✓	✓					✓		
Special Education Services	✓	✓	✓	✓	✓	✓			
Resident Intern Exchange	✓					✓			
<u>COLOMBIA (SW) - SOUTH CAROLINA</u>									
Assistance to Institute for Mentally Retarded	✓		✓	✓	✓	✓			
Assistance to Institute for Blind and Deaf	✓		✓	✓	✓	✓			
Visit of Folk Singer							✓		
<u>EL SALVADOR - LOUISIANA</u>									
Special Education Seminar		✓	✓		✓	✓			
Physical Therapy Seminar	✓	✓	✓		✓	✓			
Speech and Hearing Workshop	✓		✓		✓	✓			
National Center for Deaf	✓		✓		✓	✓			
Special Olympics	✓	✓	✓	✓	✓	✓			
Intensive Care Unit-Social Security Hospital	✓	✓	✓	✓	✓	✓			
<u>NICARAGUA - WISCONSIN</u>									
Philip Falk School	✓		✓	✓	✓	✓			
Children's Hospital Rivas	✓		✓	✓	✓				
Road Construction - Granada	✓	✓			✓	✓			
New Cultural Experiences									✓
Corn Island - La Crosse Health Center	✓	✓	✓	✓	✓	✓			
Volunteer Fire Department	✓	✓	✓		✓		✓		
Scholarship Program			✓				✓		
Homemakers School	✓		✓	✓		✓			
Vocational Agriculture	✓		✓	✓				✓	
School Supplies Program	✓	✓	✓		✓	✓			
Community Dental Program	✓	✓	✓	✓	✓		✓		
Managua Politechnical Institute	✓	✓	✓	✓	✓	✓			
East-Coast Rural Health Program	✓	✓	✓	✓	✓	✓			

<u>PARTNERS AND PROJECTS</u>		Develop Capacity Meet Needs	Continuous Program Benefit Large Numbers	Address Needs Low Income Groups	Address Most Basic Human Needs	Address Needs Large Numbers at Low Cost	Benefit LA County	Too Soon to Judge	No Appreciable Results	Benefit Primarily US Partners
<u>PARAGUAY- KANSAS</u>										
Mental Health		✓							✓	
Agricultural Pest Control		✓	✓	✓	✓			✓		
Home Economics Extension		✓	✓	✓	✓			✓		
Hospital Medical Equipment				✓	✓	✓			✓	
<u>VENEZUELA - TENNESSEE</u>										
Pre-School Education		✓	✓	✓	✓	✓	✓			
Medical Exchange		✓	✓	✓	✓	✓	✓			
Language Training		✓								✓
Teen-age Exchange										✓
Community Development		✓	✓						✓	
<b>TOTALS - PROJECTS</b>	46 <sup>1</sup> / <sub>1</sub>	39	29	35	28	32	22	14	6	4

1 / Although 62 projects were reviewed, as indicated in the draft report, this analysis is limited to 46 projects to eliminate some non-AID sports and cultural activities which were studied to get a comprehensive picture of the partners as well as some AID-related activities where there was some confusion whether they represented projects, activities or trips.

(1) Administration of State Partnerships

- With the exception of Georgia, the bank accounts of the state Partners are usually well under \$1,000. Most of this money comes from dues or assessments against the small numbers of active members discussed above, voluntary contributions and small fund-raising activities. They are able to get by as a result of in-kind contributions from participating institutions, e. g. , office space, local and long distance calls, etc.
- Two of the Partners (Tennessee and Illinois) have received state grants for the administration of the program, and Tennessee has recently renewed its request for this year.
- Citizen exchange programs usually yield a small margin that can be used for administration and unforeseen program expenses.
- In addition the key officers and committee chairpersons spend anywhere from ten hours per month to 30 hours per week of uncompensated and unreported time on Partners' activities, and pay sizeable sums for non-reimbursed travel to meetings, long distance calls, lunches and dinners, and out-of-pocket expenses.
- In general administration is very lean, and the Partners, like most voluntary organizations, have to scrounge for every penny for administration.

(2) Project Support

Most project support, which is considerable, involves little cash outlay, but the employers continue the salaries of the specialists while they are engaged in Partners activities. This includes the time they are in travel status, planning for the project, and followup after the visit. A variable of this arises in the case of someone who must provide a substitute while he/she is away, and this is normally a personal out-of-pocket expense. Generally travel funds are not available from collaborating institutions, and the U. S. Partners must rely on the funds available through NAPA or from other sources in the state. An exception to this is the citizen exchange program where, of course, all costs are

met by the travelers with a small margin for the Partners. That the Partners are generally successful in getting project support is shown by the fact that in FY 1975 the eight Partners studied received about \$98,009 from NAPA for development-related travel, and they were able to raise \$85,354 in travel funds from other U.S. and Latin American sources. Using the NAPA formula for determining the value of the services of the volunteer technicians, these eight Partners raised \$874,410 in FY 1975 for development-related technical assistance and training.

(3) Support for NAPA

The membership base in the state Partners is obviously far too narrow at this time to permit any serious consideration of a dues assessment for NAPA.

- (4) Overall it must be recognized that the volunteers are not primarily fund raisers, and unless the base of the program is modified the U.S. Partners are not a likely source of funding for the national association and NAPA staff.

2. Recommendations

- a. The state Partners should be encouraged to explore the possibility of greater involvement of the business community in project activities, and in particular the possibility of obtaining sums of, say, \$2,000 - \$5,000 to fund travel and related costs of particular projects with a small margin for Partners' administration.
- b. NAPA should explore the possibility of conducting a series of workshops on fund-raising, or having a panel on this subject at the next annual conference. Any such sessions should be adapted to the modest needs of the Partners, their volunteers' status, and their general feeling that they are not fund raisers.

F. Dependence of the Partnership on the Program and Administrative Services of NAPA Staff

1. Findings

- a. In the main, the services of NAPA are:

- an informal information exchange and guidance system on program and administration;
  - new program initiatives as in agriculture and Partners Rehabilitation-Education Program (PREP) ;
  - Fund raising as in sports, cultural affairs, and other areas;
  - Linkage with national organizations;
  - Image building, brochures, newsletters;
  - Workshops, seminars, and training of volunteers;
  - Guideline issuance;
  - Travel approval and its financing;
  - Annual meeting.
- b. Although some of the Partners feel they can "go it alone" without NAPA staff, in the view of the evaluators this is not realistic. Assuming AID continued support, this idea would involve AID arrangements with the 46 U. S. Partners in 43 states or allocations to the missions and negotiations of a mutually satisfactory program among the mission, the embassy (which has a significant interest in the Partners), and the U. S. and Latin American Partners. Even if AID were staffed to make and monitor 46 grants, a number of the NAPA functions listed above would not be performed. Assuming adequate support from non-U. S. Government sources and no AID funding, some state Partnerships might "go it alone" without NAPA staff support, but they would soon lose their sense of identity with the Partners of the Americas, the benefits of exchange of ideas and experience with other Partnerships, the push and guidance from professionals who can see beyond state boundaries. They would also lose the value of someone checking their decisions on use of funds for travel. In sum, it might be possible to have a number of state organizations without a central staff service, but a national organization requires a central staff service agency.
- c. Travel approval is, of course, the most sensitive activity because it is NAPA's one control device. NAPA staff operates under regulations developed by the travel committee and approved by the

executive committee. And yet AID-supplied funds ranged from a low of \$6,254 in South Carolina, a program just getting started, to a high of \$18,364 in Louisiana. NAPA funded portions of the costs of an average of 20 trips for each of the eight Partnerships during FY 1975.

- d. Even those Partners who allege bias in approval of travel funds find useful the other services provided by NAPA staff.
- e. Some of the Partnerships would undoubtedly survive, and some might be challenged to do better without some type of coordination and leadership mechanism, but the individual Partners need someone looking over their shoulder on travel which is really program development; need more program and administrative guidance and information exchange than they are getting; need a sense of national purpose and identity.

2. Recommendations

- a. Although the executive committee is broadly representative of the state Partners, it is not uncommon for the policies and staff activities of a national organization to get out of phase with the views and priorities of the members, especially at a time when the program is in transition. It is recommended that the chairman of the board appoint a special task force from U.S. and Latin American Partners to examine the priorities and emphasis of NAPA services and report at the next annual meeting.
- b. Part of this review should include an examination of the possible need for curtailment of some services and possible expansion of others, or alternative sources of funding in view of the probable further reduction of AID funding.
- c. In making the foregoing recommendations we call attention to the fact that we found NAPA staff activities helpful to the state Partners. Some of the Partners, however, have different perceptions, particularly with reference to travel, and in a voluntary organization an examination by a representative group of members could help clear the air, especially at a time when reduction of funds may require adjustment in some activities that are considered useful and productive.

G. Relationship between Partnership Expenditure on Projects and Development Aspects of Projects

1. Findings

- a. For the reasons cited above there are problems in defining projects and therefore of measuring the costs of individual projects. The evaluators found that AID-supplied funds were being used for project development and implementation. Under NAPA travel regulations these funds are being husbanded carefully, and in most instances the state Partner must find ways to supplement AID-supplied funds to finance a trip.
- b. AID-provided travel funds for these eight Partnerships amounted to \$98,009 for 163 trips in FY 1975. These generated an additional 127 trips at a non-AID cost of \$85,354. Adding the \$85,354 to NAPA's estimate of \$874,410 for the value of the volunteers' services, we find that AID's \$98,009 has produced \$959,764 in travel and volunteer services. This is a ten to one return on AID's investment exclusive of the inputs of local staff who participate in workshops and put into practice techniques learned through technical assistance and training. This item also excludes purchases of U. S. equipment that often result from technical assistance and training, e. g., purchase of tests used for determining level of speech and hearing, purchase of latest instruments used by dentists receiving post-graduate training in the United States. It also excludes estimated costs of donated equipment, scholarships, etc.
- c. In considering the relationship between the Partnership expenditures and the development aspects of projects, it is important to keep clearly in mind that the inputs in most projects are modest and expectations should be modest. For the eight programs reviewed, the average expenditure of AID-supplied funds for all developmental projects is \$12,251 per Partnership in FY 1975. As previously mentioned, this is less than the cost of two consultants hired by AID to serve in Latin America for two months each. Accepting NAPA staff figure of 205 projects in these eight Partnerships, the cost in AID-provided funds is less than \$500 per year per project. Even if we reduce the number of projects by half, because of the difficulties cited previously, the cost to AID is in the neighborhood of \$1,000 per year per project, a modest cost, indeed, in any international activity. For this nominal cost, 78 percent of the 46 projects (Table III) funded from all sources and studied in some depth, addressed three or more of the AID guidelines.

- d. As discussed more fully under the Latin American Partnerships, and apparent in the project summaries in the Annex, most Partner projects do not fall into AID's top priority activities. Although some may change public policies or the nature of important institutions, they are more likely to affect development at a secondary or tertiary level where major donor programs do not reach, e. g., improvement of a local clinic or service. Further, they bring American technicians into direct working relationships with institutions serving the very poor, e. g., day care centers for the children of working mothers in the poorest barrios, improvement of extension agent services to subsistence farmers.

## 2. Recommendations

- a. Improved project planning, as discussed above, will lead to improvements in project implementation. Further, guidance on and discussions of the developmental program will contribute to the selection of projects more likely to support local needs and aid the overall development process. This objective can be achieved through workshops jointly sponsored by NAPA and AID to provide guidance to U. S. and Latin American Partners in:

- AID aims and objectives;
- project planning for development impact by volunteers;
- needs assessment by volunteers;
- Matching resources and needs;
- follow-through for results;
- evaluation.

## H. Effectiveness of Volunteer Technicians' Travel and Administrative Services Provided by NAPA in Supporting Developmental Goals

### 1. Findings

- a. The effectiveness of volunteer technicians' travel is conditioned by a variety of factors, among them:
  - the correct assessment of local needs;
  - mutuality of understanding of the problems and results expected;
  - selection of the right technician professionally and personally;
  - ingenuity of technician in responding to the unexpected;

- ability of the technicians to communicate;
  - interest and willingness of the technician in following through after the field visit;
  - advance notice and preparation for the visit.
- b. The status of NAPA guidance has been discussed elsewhere as well as the need for further efforts.
- c. The NAPA travel regulations and procedures developed by the travel committee and issued September 1974 are clear and detailed, and emphasize developmental needs. Recognizing that there will always be some differences in interpretation, nevertheless, a minority of the state Partners perceived of NAPA staff as biased in their administration of travel funds. There is no way to document such perceptions because most disapprovals come informally when the state Partners are persuaded by NAPA staff not to submit a formal request for funding. Furthermore, there is an area for judgment by NAPA staff as to the adequacy of the case that can be made for a particular trip. This flexibility and judgment area contributes to demands for careful project planning and serves as a buffer for questionable projects that the state Partners might otherwise undertake. Beyond these considerations, any state Partner has the right to appeal any NAPA staff decision to the travel committee.
- d. One other problem encountered in several of the Latin American Partners was last minute word on the arrival of the volunteer technicians. Whether due to NAPA staff or the state Partners is not clear, but late notice has required improvisation and precluded some of the careful advance scheduling that would have been preferable.

## 2. Recommendations

- a. Recommendations with respect to NAPA administration of travel will be found in the discussion of NAPA.
- b. Other measures previously discussed are designed to improve project selection and impact.
- c. Special efforts should be made to improve advance notice of technicians' specific travel plans so that the Latin American Partners and the collaborating institutions can make adequate preparations for the visit.

## VII. LATIN PARTNERSHIPS

### A. Introduction

Before responding to the particular issues raised in the scope of work, it may be helpful to sketch briefly some general observations about the Partners in Latin America.

- With the exception of Venezuela, there is little tradition of volunteerism in Latin America. As a result many of the key Partners are government officials who are able to get things done by their high level personal contacts with such people as two Presidents and numerous cabinet officers and heads of autonomous institutions.
- NAPA staff maintains that it has no responsibility for service to the Latin American Partners, and as a result the Partners have operated on their own except where they were helped in the past by their U. S. Partners or received technical and financial assistance from the AID missions.
- While some Latin American Partners are generally aware of AID guidelines through previous association with AID, they have not been informed of the AID guidelines by NAPA staff, their U. S. Partners, or the AID missions.

We shall now respond to each of the questions in the scope of work.

### B. Extent of Local Participation within the Partnerships as well as the Degree of Viability and Effectiveness of the Partnerships

#### 1. Findings

- a. The Latin American Partners are not broad-based membership organizations. On the contrary, our best judgment is that there are no more than a total of 250-350 active members in all of the eight Partners we reviewed. Membership is almost entirely in the area of the capital of the national or regional Partnership, with the exception of Nicaragua where much of the activity is on the east coast. Although there is conversation about broadening the program to other cities, little has been done.
- b. Despite their small numbers, in most of the countries visited the Partners have demonstrated the capacity, along with their U. S. colleagues, of identifying development needs, obtaining necessary resources, and following through on the implementation of successful projects.

This comes about through an often bewildering set of inter-connecting relationships with governmental and non-governmental institutions and influential individuals. As a case in point, in Venezuela where there are five columns of associations of various types listed in the telephone directory, two members of the Partners board are active in the 450-member Association of Venezuelan Volunteers, and two are in senior posts with the influential North American Association and in particular its committee on medical exchange. In Bolivia, where the Partners are selective in inviting to membership only those who can contribute their time and expertise, the program has the personal support of the President and two cabinet ministers. In Pernambuco one member of the PREP committee is the head of the area's largest hospital and another is president of the local association for the physically handicapped. In Nicaragua the honorary chairperson of the Partners, President Somoza, has given support to the program and has visited with the Governor of Wisconsin and the president of the University of Wisconsin, both active in the Partners.

In sum the Latin American Partners derive their strength from a comparatively small, close-knit, group of committed individuals who believe in close links with the United States and who know how to get things done through a network of individual and institutional resources.

- c. Given the narrow base discussed above, the viability of the Latin American Partners is dependent largely on the quality of the local leadership. Some have survived rather traumatic changes in leadership in the past, and there is no reason to question their survival capacity in the future.
- d. Changes in U. S. funding would have a limited direct effect on the Latin American Partners as it appears that there is little use of AID-provided NAPA funds for travel of Latin Americans. Although the evaluation found some examples of wise use of these funds in bringing key Latin Partners to the U. S. , state and Latin American Partners are not generally aware of the availability of NAPA funds for this purpose.

The indirect effect of a withdrawal of AID funds could be quite serious. As previously discussed, most of the AID-supplied NAPA funds are used for the planning and initiation of projects.

A consequence of a sharp cut would be to shift the program

away from attention to development. It would also slow efforts toward joint program and project planning by slowing the flow of U. S. volunteer technicians who still do much of the project planning with the concurrence of the local institutions and the local Partners. Thus, indirectly, a sharp cut in AID funding could seriously affect the viability of the Latin American Partners as agents for development. The effect on their viability for "people to people" programs, for sports, and for the arts, which are not funded by AID, is less clear but since the Partners operate a single program with many facets, a sharp drop in development activities would have some effect on other activities which are of importance to the American embassies.

- e. The viability of the Latin American Partners cannot be judged by their limited budgets but by the resources for development they can mobilize. Several have bank accounts below the equivalent of \$200, but some have board members whose ministries or autonomous agency employers recognize substantial amounts of time spent on Partner activities. Others can call on government for such matters as transportation or the printing of Partners stationery. In addition, like volunteers in the U. S. , the active members either pay regular dues, as in Bolivia, or regularly dig into their pockets to meet special needs.
- f. Their strength lies in their catalytic roles in tapping local resources. These are people with influence and connections. When a project developed between the U. S. and Latin American committee chairpersons and volunteer technicians meets a local need, these are the people who can find ways to provide local transportation and hotels and meals, who are instrumental in finding the local funds to make the project go, and who can help develop the multipliers that will make a significant impact on the development process. From this point of view, they are not only viable but a necessary part of the development process.
- g. The Latin Partnerships are generally effective in joining with U. S. Partners in mounting useful projects in the areas of people exchanges, sports, cultural activities, and development. Part of this effectiveness is attested to by the interest of the U. S. embassies in the Partners. This interest is not only at the staff level; the ambassadors are knowledgeable and have a strong personal interest in the Partners.

- h. The Latin American Partners are generally effective in generating public and private resources in support of development programs and projects. It is partly through their efforts that the previously discussed ten to one ratio of technician services to AID investment is achieved. With an improved accounting for the time of Latin American technicians and participants, this ratio would be materially increased.
- i. They are also generally effective in putting technicians together to develop projects with a minimum of delay, in removing obstacles to action through their networks of contacts, and in handling crisis situations. Some of them are highly effective in integrating Partners' activities into ongoing programs of other organizations.
- j. Their effectiveness in identification of development needs and in programs and project planning is more uneven, and several of them recognize the need of guidance and assistance in this area.

## 2. Recommendations

- a. Although the Latin American Partners should be encouraged to broaden their base functionally and geographically, there should be no pressure to have them become broad-based nation-wide membership organizations. They are different from voluntary organizations in the United States because of the absence of a tradition of volunteerism in Latin America. They should be accepted as comparatively small, close-knit organizations of influential people who are able to get things done within and through the power structures in their country; they are catalysts for private sector participation in development.
- b. Their viability and effectiveness can be materially improved by providing improved guidance to them along the lines suggested below.
- c. Some of them are extremely sensitive to what they feel are slights or lack of consideration by NAPA staff, perhaps due to a misunderstanding of the staff's responsibilities, and their U.S. Partners, and efforts should be made, as in El Salvador, to establish a relationship of equality between the U.S. and Latin American Partners in project planning and implementation.

- d. Special workshops should be planned for some of them to improve program and project planning, and the structure and operation of voluntary programs.
- e. As discussed in more detail below, a program should be developed to provide guidance on development and AID objectives.

C. Ability of Partnerships to Promote, Develop, and Implement Self-Help Projects

1. Findings

- a. All of the Partnerships have shown the ability to promote, develop, and implement self-help projects. We found no indications of interest in having North Americans come to Latin America to do something; the interest was in demonstration, training, and technical assistance. Even in the extreme case where U. S. doctors are brought in to perform surgery, for example, it is to demonstrate techniques and solutions of problems that the local doctors have read about in the medical journals but have not practiced under supervision. Hopefully the American doctors will have helped them to apply what they have learned in teaching medical students as well as in their clinics.
- b. Both the U. S. and Latin American Partners seem to prefer projects involving a combination of analysis, training, and technical assistance in which the results are immediate and observable and contribute to a broader goal. (See project summaries in Annex III). Every AID-related project included in Table III and the annex is a self-help project.
- c. The ability of the Partners to plan and implement projects is conditioned by their:
  - knowledge of project planning;
  - participation in various workshops like PREP (1972), Rural Development (1975), and Rural Health (1975).

The fact that the PREP program (rehabilitation and special education) is so widespread is due in a large measure to the earlier workshop and the close NAPA staff scrutiny of proposed projects before approval of travel. The agricultural and health workshops and the panel at Albuquerque in November 1975, are too recent, as yet, to have had any appreciable effect on the program.

- d. Unfortunately there were so few Latin Americans at the Albuquerque meeting that most of them are not aware of Dr. Ned Wallace's excellent paper on project planning which, as of the time of our study (January 1976), had not been distributed to the Latin American Partners.

## 2. Recommendations

- a. AID needs to consider some mechanism for guidance to the Latin American Partners. In our judgment, the NAPA staff would be the most appropriate instrument for this service in the absence of any existing resources in the organization of the Partners of the Americas. However, this decision may be dependent on the capacity and willingness of the NAPA staff to undertake the servicing of the Latin American Partners.
- b. Increased guidance should be provided to the Latin American Partners in project preparation and substantive aspects of development programs by including them in the programs previously discussed and in the recommendation that follows.
- c. Provision should be made for increased participation of Latin Americans at the annual NAPA conference, including efforts to include Latin American representation on all panels.

## D. Access to Private Funding and Other Support of Projects

### 1. Findings

- a. None of the Latin American Partners undertakes general fund-raising campaigns. They raise their money for administration largely by dues from a small group, voluntary contributions, and as in the case of Pernambuco, from an extra charge on the mass citizens exchange.
- b. Because of their personal contacts and networks of relationships, they are able to tap many local resources for project activities.

As a case in point, when a two-week child care seminar was oversubscribed, the Partners were instrumental in arranging for two one-week seminars, for conference space for 150 people with facilities for simultaneous translation, get the services of additional local professionals and support staff, pay the international travel for two of the four Americans, and obtain a three-bedroom apartment for the volunteer specialists at the Hilton.

In another case, the President of Bolivia offered his facilities for flying television equipment to La Paz.

As another illustration, the Partners are aware of the free cargo space available on some international airlines, and know how to have some supplies and equipment delivered at nominal cost.

Perhaps the most dramatic tapping of resources is the special reduction in fares granted by TACA for visits of Partners between Louisiana and El Salvador. One further example is the Illinois - Sao Paulo Bicentennial Week scheduled for 1976. The estimated cost is \$1,000,000 to be raised from individual and business sources in Illinois and Brazil.

In Pernambuco, the local universities will pay most of the costs, over a ten-year period, for bringing long-term and short-term specialists from Georgia, and for sending graduate students to Georgia universities.

Most of these contributions are in kind, come from agencies engaged in international activities, or from government institutions.

- c. Although there is no well developed pattern of institutional giving in Latin America and most funds come from government, the Partners studied have been reasonably successful in tapping private and public resources.

## 2. Recommendations

- a. A panel, at the annual conference, on fund-raising activities of the Latin American Partners, followed by ample time for informal exchange of information, would be a stimulus to many Partners.
- b. A special supplement to the NAPA newsletter could report on fund-raising techniques as well as other activities of the Latin American Partners.

## E. Extent to which the Partnerships Recognize the New Guidelines and have the Interest and Ability to Develop Projects that meet Developmental Goals with Special Emphasis on AID Guidelines

### 1. Findings

- a. The Latin American Partners were not aware of AID-NAPA relationships and had not heard of the AID guidelines at the time

of the survey. This is understandable as the guidelines were part of an AID grant to NAPA and

- NAPA maintains that it serves only the U.S. Partners with only incidental service to Latin America;
  - the guidelines were issued to the U.S. Partners as controls on NAPA travel funds which, in practice, are limited largely to North Americans and the U.S. Partners were not asked to convey them to their Latin American colleagues;
  - the AID missions are uncertain of their proper role with regard to the Partners and would have had little occasion to communicate with them about the guidelines;
  - AID/Washington's first discussion of the substantive aspects of the guidelines with the U.S. Partners (i. e. , exclusive of discussions with NAPA) came at the Albuquerque meeting in November 1975, and by January 1976, that discussion had not filtered down to the Latin American Partners.
- b. Despite their lack of awareness of the guidelines, the Partners demonstrated that much of their program falls within the guidelines (see Table III and project summaries in Annex III. ) Furthermore, without exception, they showed an interest in doing more to support developmental goals, particularly in agriculture and nutrition, and in serving the poorest of the poor.

## 2. Recommendations

- a. Concerted action by AID, NAPA staff, and the U.S. Partners, as well as Latin American Partners, will be needed to achieve a quantum jump in the thrust of developmental activities. This will include:
- conveying the guidelines to U.S. and Latin American Partners in a programmatic or substantive form and not limited to travel regulations;
  - workshops on selected aspects of the development program for both U.S. and Latin American Partners;

- information from AID on broad development goals and programs in a form to which the Partners can relate;
  - information from the missions on the goals, nature, and scope of the country programs.
- b. Guidance should be sent to the AID missions and embassies on their relationships with the Latin American as well as with the U. S. Partners which would take into account the independence of these voluntary organizations as well as their need for information on development and AID objectives. This guidance should include information with reference to ongoing, phasing-out, and graduate AID programs.

## VIII. NATIONAL ASSOCIATION OF THE PARTNERS OF THE AMERICAS

### A. Introduction

As previously mentioned in the overview of the Partners, page 4, NAPA is composed of the 43 Partnerships in 46 states, the Board of Directors made up of a representative of each Partnership, and an executive committee of four elective board officers, seven state Partner representatives who serve with the three federations of the Partners of the Americas, and the president as a non-voting member, guide day to day activities of NAPA. The president is selected by the executive committee and he in turn hires and directs the NAPA staff.

In an association of volunteers there is no governing body; the board of directors is a policy body with no direct control over the Partners. The only control mechanism is the power to grant or withhold funds for the travel of volunteers, in the case of the eight Partners studied averaging \$12,251 for development related activities in FY 75 and providing for partial funding of an average of 20 trips per year.

NAPA staff and the travel of the volunteers are funded from a variety of sources, but the main supplier is the Agency for International Development. AID funding provides for various overhead functions and the salaries of about four and one half professionals. The Lilly Endowment provides for two professionals, one in agriculture, one in rehabilitation and special education. The others of a total professional staff of eight are paid from other sources. No funds for NAPA staff activities are received from the state Partnerships which, at this time, have too limited a membership to make even token payments for NAPA staff services.

### B. Effectiveness of NAPA Leadership in Encouraging Partnerships to Develop Projects with Development Impact

In assessing this question several considerations must be kept in mind:

- NAPA has no chain of command over the state Partnerships and whatever influence it has must come from leadership and persuasion;
- Although development has always been an element in the Partners program it has become a major concern of NAPA only within the past years as a result of pressure from AID and the increased professionalism of its staff;
- The only direct control NAPA has over the state Partners and their activities is the approval or disapproval of funds for the travel of the volunteers.

1. Findings

- a. Within this framework, there has been a substantial increase in NAPA's efforts to move the Partners in the direction of development activities.
- Issuance of guidelines, August 14, 1975, which establish various conditions for Partners and NAPA approval of funds for the travel of volunteers and limit the use of funds provided by AID to developmental activities.
  - Conducting a carefully structured workshop on rural development which had as its objectives the development of realistic projects. This workshop in Central America had teams of participants from 14 Latin American and U. S. Partnerships;
  - A similar seminar on rural health;
  - Follow-up on a 1972 conference on rehabilitation and special education by increased attention to institutional changes and use of techniques appropriate to the limited professional skills and resources in Latin America;
  - The annual conference in Albuquerque in November 1975 which gave important attention to agriculture, education and health, produced an excellent paper on project planning, and provided an opportunity for presentation of AID development objectives;
  - Professionalization of NAPA staff including the employment of a rural development specialist and a specialist in rehabilitation and special education (PREP) in late 1974 under a grant from the Lilly Endowment.

As all these actions have taken place within the last two years, it is too soon to judge their effectiveness as it takes time for diffusion of ideas, especially among volunteers who are not making a living from the Partners and are not responsive to directives from top management. Nevertheless our evaluators observed that at board meetings and in individual interviews very substantial attention was being given to problems of development.

- b. Although the travel guidelines and the Partners long established practice require written concurrence of the Latin American Partners on all projects, the Latin American Partners had not been informed of the guidelines and were only generally aware of AID's involvement in the program and the current heavy emphasis on development.

- c. Only a handful of Latin American Partners were at the Albuquerque meeting to appreciate the current stress on development and those who did not attend had not been informed.
- d. Nevertheless, as previously discussed (see Table III) 78% of 46 projects funded from all sources address at least three of the five AID guidelines and ten of fourteen new or revitalized projects address four or more of the guidelines. These results can be attributed in part at least to increased professionalization of the NAPA staff in recent years and the effectiveness of telephone contacts and personal visits to the state Partners in advising on improvement of Partners' operations and in urging new and broader activities in the area of development.

## 2. Recommendations

- a. NAPA staff should broaden understanding of development objectives by conveying information to the U.S. Partners on substantive aspects of development programs and examples of projects which may be appropriate to the Partners. Some of this is being done through the newsletter but additional efforts will be required to get action.
- b. NAPA staff and AID should jointly sponsor a series of workshops on program and project planning in critical development areas like agriculture, nutrition, health, and education designed to: encourage use or adaptation of the guidelines for project preparation developed by Dr. Ned Wallace of the Wisconsin Partners; provide substantive background the Partners might lack; suggest types of project activity suitable for volunteers; explore problems of serving the very poor. Latin American as well as U.S. Partners should participate.
- c. In planning for future annual conferences, provision should be made for active participation of representatives of Latin American Partners and a reserve of travel funds should be set aside to facilitate their attendance.
- d. Although it may not be timely to publish the full summary of the Albuquerque meeting, it would be useful to issue highlights of discussions of developmental activities for the information of the U.S. and Latin American Partners. This might include the AID panel and panels on agriculture, education and health.
- e. Although the NAPA staff maintains its jurisdiction is limited to service to U.S. Partners and it provides only incidental service to the Latin Americans, arrangements should be made

for NAPA staff to transmit the guidelines and related developmental materials to the Latin American Partners.

C. Criteria Used to Determine Allocation of AID Funding

1. Findings

- a. NAPA staff does not have a system, seemingly contemplated by the by-laws, in which the Partners submit an annual plan and budget and so much is allocated for approved activities which meet certain criteria. Nor does NAPA staff have AID or any other funds for support of project activities beyond the travel of volunteers. Thus AID funds are used for approval of travel of individuals or groups of volunteers based on the AID criteria and additional criteria used by NAPA staff.
- b. As mentioned above, the AID criteria have been issued in the form of travel guidelines advising the Partners what will and will not be approved. The guidelines include language taken verbatim from the grant.
- c. Beyond the AID requirements, NAPA staff have their own criteria based on regulations and procedures issued by the travel committee designed to accomplish programs objectives and stretch limited travel funds. These include such matters as using granted funds for project development and expecting the Partners to find other sources of funding for additional trips; funding the travel of perhaps two out of a group of four, or providing funds only for the ticket, or when it is necessary to pay per diem, paying well below the authorized U. S. government rates; when husband and wife, who are specialists in different fields, are travelling together on Partner business, paying for travel of only one of them; reviewing the project to make sure that it is supported by the U. S. and Latin American chairpersons and that the project has been thought through and has a reasonable chance of success.
- d. These criteria are reasonable and discourage "junketing." Almost invariably they require a cash outlay by the American volunteers and often a substantial contribution, e. g., hotel and subsistence, by the Latin American Partners. The frugality with which these criteria are administered is reflected in the decrease in the unit cost per trip and an increase in the number of trips from AID-supplied funds during a period of sharply rising costs.
- e. Although the travel regulations are clear, per se, they relate essentially to the approval of development projects, an area where criteria are not spelled out and where considered judgment

is essential. In this judgment area some of the Partners perceive that travel funds are not administered in an even-handed manner and may be used to favor certain programs and individuals supportive of NAPA staff interests. The evaluators found nothing which sheds light on the facts involved, but the perception does exist.

2. Recommendations

- a. NAPA staff should take the lead in encouraging the U.S. Partners and their Latin American Partners to develop an annual plan, appropriate to a voluntary organization, which would examine program needs that can be met by the Partners, available current and potential resources, present and potential membership base, funding, travel requirements, etc. The plans might show where the Partnership's now are and where they expect to be a year hence in structure, membership, and programs and projects; the human and financial resources available and needed and where they may be obtained; and the results expected. The plan need not be elaborate but can provide a framework for the Partners to determine jointly where they are and where they are going. These plans will also provide a basis for NAPA staff allocation of its own time and resources to provide assistance in areas of need shown by the plans of the state and Latin American Partners.

The planning process can be initiated through the work shops on program and project development proposed earlier in this report.

- b. The NAPA staff should also develop an annual plan for consideration by the executive committee which would show, on a priority basis, how it intends to meet needs identified by the board and executive committee, NAPA staff, and by state and Latin American Partners, the resources required, and plans to obtain those resources. Summaries of the annual plan and NAPA staff priorities for the year should be made available promptly to all the partners.
- c. Continuation of a perception on the part of one fourth of the state Partners studied that factors other than merit affect NAPA staff decisions on approval of travel funds can seriously weaken any organization of volunteers. At least two and possibly three elements may contribute to this perception: one, as NAPA suggests, the committee chairpersons and volunteer specialists who, in fact, work out most of the plans and projects requiring NAPA funding may not be thoroughly familiar with the regulations and may be incensed when their plans are not approved; two, travel approval is, in fact, project and program approval and NAPA staff have not shared with the state Partners a full understanding of what they look for in examining programs and projects which then get translated into approval or denial of travel funding which may

appear capricious or biased; three, the perceptions may be true.

To improve understanding of the travel regulations the evaluators recommend that NAPA staff urge the inclusion of review and discussion of the travel regulations in the agenda of meetings of the board of directors of each state Partnership. The evaluators also recommend a special column in the newsletter to summarize and interpret the travel regulations and encourage and answer questions submitted by the readers.

The evaluators further recommend that as part of the workshops, previously discussed, on project and program development, NAPA staff review the elements they consider in analyzing proposed and on-going activities in various areas of development. Further, these statements should be reviewed by NAPA's program consultants and other specialists and knowledgeable volunteers from state Partnerships and issued as guidance memoranda for the state and Latin American Partners. These memoranda would deal with the substance of program and project analysis and implementation, would provide linkage to travel funding approval, and lessen the danger of erroneous perceptions.

The two previous recommendations will narrow the area of possible differences but will not resolve the problem in the event there are some bases for the perceptions. The evaluators believe, however, that the recommendations from the various task forces previously proposed will provide an adequate basis for discussion of NAPA staff - state Partner relationships at the next annual conference and open discussion of this subject will help clear the air.

D. How Often do Development Projects Result from AID Supported Activities?

1. Findings

- a. There is no way to provide a hard answer to this question because of the way projects are defined and planned. A project may be anything from a single visit to provide technical assistance or conduct a seminar to multiple visits, both to and from Latin America, to bring about institutional change over a period of years. The evaluators finally gave up on the efforts to get a definition of projects in the U.S. or Latin America. Furthermore, the time required for a project idea to ripen into a viable project is an ever-present variable, e.g., a major project in Pernambuco involving the University of Georgia was developed and signed within ten days, but a community development project ready for implementation in Venezuela and Tennessee, fell apart, for the time being, at least, because of a change in the head of the local participating institution.

b. Nevertheless, the evaluators found that by a substantial margin Partners' projects, whether supported by AID or non-AID funds, contribute to AID objectives. Out of 46 projects studied in some depth (see Table III and Annex III), 18 address all five of the AID guidelines, 11 more address four of the guidelines and an additional 7 address three or more of the guidelines. Put another way, 36 out of 46 or 78% are directed at three or more of the guidelines specified by AID. This achievement is even more remarkable when considering that the Latin American Partners have no direct information about the guidelines. Furthermore, if five of the projects studied, which are clearly non-AID activities, are eliminated from consideration, the percent of those responding to three or more guidelines jumps to 87%. Examined from another point of view:

- Six of the projects had no appreciable results, a failure rate of 13 percent;
- Four were of principal benefit to the United States though with some benefits to the Latin American countries.
- Fourteen were new or revitalized projects which address AID objectives but where it is too soon to judge results;
- Twenty-two or 47.8% of all projects analyzed are of benefit to the Latin American country. This represents 81% of the on-going AID-related projects, i. e., excluding 14 new or revitalized projects where it is too early to make a judgment, and the four which are of primary benefit to the U. S.

Approached from another point of view, these results are achieved at a minimal cost to AID and the American tax payer. As previously indicated the average 1975 cost of AID-provided travel to each of the state Partners was \$12,251 for 20 plus trips. These AID dollars generated almost the same amount of non-AID funds for travel purposes. Thus, for a total AID investment of \$98,009 in the eight Partnerships studied, 290 trips were generated from AID and other sources. This means that each trip related to developmental activities cost AID \$338 for travel, per diem and related expenses. Furthermore, this \$98,009 AID investment provided for technical services with an estimated value of \$874,410.

Although these figures cannot be related directly to the projects discussed above because some of them have been going on for several years and some involved no travel or travel only incidental to other activities, nevertheless, it seems clear that AID

is getting substantial productive development-related activity for a minimal investment.

2. Recommendations

- a. As part of the efforts to improve NAPA's reporting system, a task force should examine project reporting and recommend a definition or definitions for projects. The task force should also recommend means by which U.S. and Latin American partners can relate numbers of trips and related costs provided by NAPA and other sources to particular projects.
- b. The task force should report to the Partners at the next annual conference.
- c. When definitions are available NAPA should re-examine its reporting of project activity in relation to the new definitions.

E. Relationship between AID Provided Funds and the Number of and Efficiency of Development Projects

1. Findings

- a. Funding used to promote programs through seminars and follow-up by NAPA staff has a direct bearing on program emphasis as reflected in types and numbers of projects. Thus the use of AID funds for a major PREP seminar in 1972 and use of AID and Lilly Endowment funds for follow-up has resulted in a great deal of activity in the fields of rehabilitation and special education in 1976. By contrast, the partners have undertaken only scattered activities in agriculture and this can be traced back to the fact that no major attention was given by NAPA to agriculture and rural development until 1975 when it was possible to hire an agricultural specialist under a grant from the Lilly Endowment. Beyond these two areas, the program reflects the lack of specialized attention to other areas such as nutrition, education, and public health except where individual partners have chosen to pursue activities in these fields.
- b. Under NAPA travel regulations, AID funds are used primarily for project development, that is, the first few trips, and additional trips for continuity are expected to be funded from other sources in the states and in Latin America. Although AID funds only about 20 trips per Partner per year at an average cost of \$12,251, these trips play an important catalytic role out of all proportion to the money involved. They lead directly to developmental projects; they stimulate almost as many additional trips (127 funded from other sources versus 163 related to development and funded by

NAPA) at no cost to the U. S. government; they involve the Latin Americans by committing them to find ways to finance a major share of the costs for action programs. In one case our study showed a project using about \$2500 of AID provided funds for ten person-weeks of technical assistance and training. The local costs through the Latin American Partners are estimated at \$50,000 - \$75,000. This can certainly be viewed as a substantial investment through the Latin Partners in a successful local project.

- c. As shown in Table III, our studies showed that among 46 projects in all types of activity, 36 or 78% addressed three or more of AID's five guidelines. Only six could be written off as failures. By contrast 22 were of some current benefit to the country and 14 new or revitalized projects are of potential benefit, i. e., more than 78% of the total studied in some depth. If we exclude the four projects that are primarily for the benefit of the U. S., but with significant local benefits, the percentage would be even higher, 87.8%.

Several caveats are in order, however. First, the number of projects in AID's current areas of concern, e. g., agriculture and nutrition, are nowhere near their potential because the AID guidelines were made available to U. S. Partners fairly recently; NAPA issued the guidelines in a travel format; and a discussion of substantive programs began only with the two Central American workshops early in 1975 and followed by the Albuquerque meeting in November 1975.

Second, the Latin American Partners have not yet been informed of the guidelines.

Third, there has been no effective dialogue with AID other than the Albuquerque meeting so that the U. S. and Latin American Partners have no real insight into AID's needs, programs and priorities beyond the bare bones outline provided in the grant.

One further point should be noted in the relationship of AID funding and development projects. Should NAPA be successful in finding alternatives to AID funding, Partner activities would be responsive to the conditions and priorities of the new donors and these may or may not be in the field of development.

## 2. Recommendations

- a. The previous recommendations for improvement of project reporting apply here as well.

- b. Efforts previously recommended for improvement of understanding of development programs, dialogue with AID and communication of the AID guidelines to the Latin American Partners will continue to improve performance in this area.

F. Measurable Multiplier Effect in Project Dollar Values of AID Funds Through NAPA in Terms of Developmental Projects

1. Findings

We are hesitant to come to any conclusions about the multiplier effect of AID dollars because NAPA statistics are so soft. The figures of 30 to 1 used by NAPA may be correct but we cannot be sure. Some of our findings:

- Solid figures are available on costs of travel and per diem paid by NAPA and they reflect very frugal management to get the maximum number of trips from AID dollars.
- In computing costs of travel and per diem paid for by others, NAPA uses the actual figures when provided. When they are not available, NAPA uses its own average figures which may be correct, too high or too low.
- In computing the salary contribution of the volunteers NAPA uses:
  - a formula of daily rates developed in collaboration with AID, e. g., medical specialist \$150; agricultural and educational specialists \$75, etc. (Table II). Medical specialists include a range from cardiologists to laboratory technicians.
  - A formula for determining the time spent per trip, e. g., medical specialists and agricultural technicians, 36 days per visit, community workers, 24 days, etc. This figure is not based on the actual length of the trip, usually about two weeks, but includes an estimate of time for advance preparation and a follow-up after the trip.
- The costs of donated equipment are estimated by the Partners, always a difficult area, especially for laymen who are asked to make judgments on equipment that may be obsolete or in need of repair.

- The data relate only to the year in which travel funds are used and do not show continuing results, for instance the partners are directly responsible for training of Venezuelans in English at the University of Tennessee-Martin. There are now 125 Venezuelans paying out-of-state tuition as well as living costs and these figures may not show in the statistics for years in which there is no Partners' travel.
- The system does not account for the endless hours spent by the state chairpersons and their subcommittee chairpersons, sometimes as much as thirty hours per week, and their substantial out-of-pocket expenses for long distance calls, travel to meetings, etc.

Table I shows NAPA figures for NAPA and Other Sponsored travel. Table II shows NAPA figures for estimated value of technical services. We arrive at a multiplier of 10 to 1 by adding the travel costs provided from other sources, \$85,354, and the estimated value of technical services \$874,410 for a total of \$959,764. Dividing this total by AID's investment of \$98,009 we arrive at a return of approximately \$10 for each dollar of AID investment in the eight Partnerships studied.

Because this figure omits hard data available from some of the state Partners, like the \$250,000 in out-of-state tuition plus related expenses paid by Venezuelans in Tennessee, we are included to feel that a multiplier of 20 to 1 is probably reasonable. But no one can be sure until the statistical system is improved.

## 2. Recommendations

- a. As previously recommended, there needs to be a complete examination of NAPA's statistical reporting system through the use of one or more task forces with a report and proposed revision of the system due for discussion at the next annual conference.

## G. Effectiveness and Efficiency of NAPA's Efforts in Generating Support for the Program from Sources Other than AID

### 1. Findings

Whether a figure of 10 to 1 or 20 to 1 is used, there is no question that the NAPA system has been highly effective in raising the major share of its program funds from non-AID sources. Most of this effort is at the state level.

- a. The largest portion of this support is in the form of the services provided without charge by the volunteers, sometimes free services provided by individuals, but often provided by institutions which continue the salaries of staff members while they serve with the Partners. Another area of support is the travel costs absorbed in whole or in part by the volunteers. Still another source is typical volunteer fund raising activities such as the sale of tickets to pay the costs involved in cultural activities or cookie sales to raise funds for the tickets of girl scouts to teach Braille typing to their counterparts when tickets for two leaders were provided from AID-supplied funds.

In sum, at the state level program fund raising is about as diversified and imaginative as in most voluntary organizations. Some development projects, however, appear to offer possibilities for additional small-scale support from the business community.

- b. The Washington office of NAPA has begun to focus sharply on fund raising only within the last few years. Funds have been obtained from such organizations as Coca Cola, Lilly Endowment, and the Bureau of Educational and Cultural Affairs of the Department of State. The measurable results of these efforts are as follows:

<u>Calendar Year</u>	<u>Amount Raised</u>	<u>AID Target</u>
1971	4,164	-
1972	24,650	-
1973	403,726	150,000
1974	292,361	250,000
1975	226,864 <sup>1/</sup>	225,000

<sup>1/</sup> Does not include \$64,500 in approved grant fund to be received in 1976.

Over the years NAPA staff has made a number of other efforts at fund raising, some still in process. As part of these efforts, from time to time fund raisers have been added to the staff but did not prove effective in the difficult business of raising funds for non-profit organizations, especially for central administrative costs. During the past two years, of course, plans to increase support from the business community were largely held in abeyance because of the recession. Nevertheless, during this period, Coca Cola has become a strong supporter of the sports program.

An important, professionally planned fund raising effort is now under way headed by the vice chairman of NAPA, a leading Philadelphia banker. This program has as its goal an endowment of \$5,000,000 which is expected to produce an operating income of \$500,000 per year.

- c. Without minimizing the importance of the fund raising efforts, our study of eight Partners suggests that a more basic question needs attention before the question of funding can be properly addressed. That question relates to the nature of the Partners organization and structure. In most of the state and Latin American Partners surveyed, there is a core of perhaps 30 to 200 active, committed members who are able to mobilize human and institutional resources. In contrast with many voluntary organizations, there is no broad-based membership which can support and demand service from the national office. On the other hand, if the programmatically effective but narrow base continues, then the national office must be principally a fund raiser rather than a service organization and will naturally turn its efforts toward those sources that it considers most productive, including the Congress. As one alternative, much more attention should be given to broadening membership within the states for program purposes and as a potential source of funds for program activities and for NAPA staff.

#### H. Becoming Independent of AID Support for Administrative Financing

##### 1. Findings

- a. NAPA has had some success in raising funds for program activities, e. g., Coca Cola for sports programs; Lilly Endowment for agriculture and PREP programs; Bureau of Educational and Cultural Affairs of the Department of State for some cultural activities.
- b. There is a general agreement that donors have little interest in providing support for central administration. This has been especially true in the last few years when the foundations have had to cut back drastically in their support even of on-going programs and business has been severely shaken by the recession.
- c. The campaign now underway for a \$5,000,000 endowment appears to have been carefully planned and lead by the right person, Fred Heldring of Philadelphia, a member of the NAPA executive committee.

The kick-off luncheon for this campaign was held in New York on February 18, 1976 and other meetings of business leaders in other parts of the country are scheduled later in the year.

- d. Obviously, it is too soon to judge the effectiveness of these and other efforts. Even if the campaign raises all the money it is seeking over the next few years, NAPA staff will continue to need AID support for administrative expenses at least during a transition period until the endowment becomes productive. AID should keep in mind that most fund raising efforts of this type initiated by non-profit organizations of this type tend to have a low success ratio.

2. Recommendations (See key Questions, XI B, page 74 ).

- I. Servicing the Partnership and Promoting a National Image for the Program to the Extent it Supports Development

1. Findings

- a. Image building has been one of the priority areas for the president of NAPA, Alan Rubin, during 1975-1976.

Underlying the concept of the Partners is maximum involvement in the U.S. and Latin America and understanding of the people, culture, history, traditions, and problems of the two hemispheres. One consequence of maximum involvement is that more people get involved in sports and cultural programs - and more publicity flows from them - than from development activities. In the judgment of the evaluators the approach of an overall partnership is essential to its success as the people who get involved in or are exposed to sports and cultural programs far exceed the numbers who can contribute directly to development. These contacts, exposures and publicity help create an identity with the Partner country and an appreciation of its problems - the first steps toward understanding of the problem of development.

They also lead to increased interest and participation on the part of those interested principally in development.

- b. To put image building in perspective: the Partners might be able to survive with a program of cultural, sports and some humanitarian activities, particularly in health and rehabilitation. If the Partners were engaged exclusively in development, it is doubtful if they could generate enough local interest to survive no matter how effective their image building might be.

Given this background, the Partners image building has taken several forms:

- Issuance of attractive brochures like "Agriculture-Partners in Agricultural Development: programs in agriculture, nutrition and community development;"

- Issuance of an informative annual report in an attractive format;
- Holding an annual conference with wide representation from other national organizations, e. g., Boy Scouts, Heart Association, whose programs can reenforce the Partners;
- Extensive contact with other national organizations especially in rehabilitation and special education area;
- National-local publicity of selected Partners' activity such as President Ford's White House meeting with the Brazilian wheel chair basketball team;
- Encouragement of publicity for Partners' activity in the local press where service overseas or a foreign guest is bigger news than in metropolitan areas like Washington;
- Encouragement of more than casual involvement in the Partners of key state officials such as state governors;
- Assuring that the Partners keep key officials such as U. S. Senators informed of their activities.

J. Servicing of the Partnerships takes a Variety of Forms with Significant Changes Occuring in the Last Year or Two

1. Findings

- a. There has been a notable change in the attention to program content, particularly in areas of concern to AID. The Albuquerque meeting gave the state Partners far more substantive information than earlier meetings in fields relating to agriculture, health and education as well as first hand information on the concerns of AID. The Albuquerque meeting also made available information on project planning that could advance the state of the art among the Partners.

This same attention to program content was shown in the two Central American workshops on rural development and rural health as well as in project development in these areas.

- b. Another type of servicing is provided well through NAPA staff by working out arrangements for cooperative activities with national organizations like Goodwill Industries, and encouraging the state Partners to work out detailed arrangements with local units and their Latin American colleagues.

- c. A third area of servicing is the close contact that the NAPA staff maintains with the state Partners by phone and more or less annual visits and the guidance provided the Partners on their operational problems. These contacts reinforce, and make real, written messages from NAPA's Washington office which may be given only cursory attention by the volunteers in the field.
- d. A fourth area of service relates to approval of funds for the travel of volunteers. AID guidelines have been issued and are used in the approval of travel. NAPA staff husband its travel resources carefully and encourages the use of other sources of funding to the maximum extent possible, e. g. , paying for the ticket and getting the volunteer or the Latin American Partner to provide housing and meals; paying for only one of two or three travellers; paying for initial trips but encouraging others to pay for follow-up visits; when per diem is required, paying well below authorized U. S. government rates.

Despite the very positive efforts in servicing discussed above, all is not rosy in this area.

- A significant minority of the Partners surveyed perceive of NAPA staff approval of travel as biased and motivated by internal politics and favoritism. The existence of this perception can be serious in a voluntary organization where the only control is approval of travel.
- Although the voluntary nature of the Partners means programs and projects will necessarily respond to the interests of the volunteers, the programs can be much more effective through a system of program and project planning from the top down and bottom up. Such a program would give the Partners a cohesiveness they now lack, give them a sense of participation in a total effort, and lead to identifiable policies for travel approval that might allay doubts and suspicions.
- The problem common to most Partners is the lack of an adequate membership base and the funding that goes with it. This is an area of servicing that needs attention and where the sharing of experience can be helpful and give the state Partners a greater sense of participation.
- Finally, the lack of adequate attention to the Latin American Partners is serious. Although the NAPA staff maintain they have no responsibility for servicing the Latin Americans, nearly half of those surveyed need assistance in program planning and development, communications, procedures, and many other areas.

Inasmuch as some of the Partners have made great progress in joint planning and equality of status between the U.S. and Latin Partners some way should be found to share this good experience with those who need assistance.

2. Recommendations

Recommendations addressed to these three (H, I, J) elements have been addressed elsewhere in this report and there would be little point in repeating them here.

**IX. IMPROVING PARTNERSHIPS THROUGH REGIONAL WORKSHOPS,  
COMMITTEE ORGANIZATION AND EXPANSION,  
LIASION WITH STATE-NATIONAL ORGANIZATIONS,  
PUBLICATIONS OR BROCHURES AND NEWSLETTERS, AND  
ADMINISTERING VOLUNTEER LATIN AMERICAN TRAVEL  
GRANT FUNDS IN TERMS OF DEVELOPMENT IMPACT ABROAD**

Most of the items included here have been treated elsewhere. In general, significant progress has been made in this area. To recapitulate briefly:

- Two rural development workshops have been held in Central America and NAPA staff have visited Brazil and other countries to promote rural development.
- Panels on agriculture, education and health were an important part of the national conference.
- Part time professional staff associates or consultants have added strength and support to some programs like health and agriculture.
- An active program of linkages with national organizations is augmenting the resources of the Partners.
- Publications, brochures and newsletters are linking the Partners together, helping in image building, and giving guidance in substantive program areas.
- Guidelines for travel have been issued which clearly limit use of AID-provided funds to development-related activities and NAPA administers these funds with frugality.
- An increasingly professionalized staff works with the state Partners for strengthened committee structure, internal operations and improved program development.

## X. OTHER EFFECTS

### A. Generating among U. S. Participants a Commitment to Humanitarian and Economic Assistance for Latin America

#### 1. Findings

a. The Partners program has taken the first steps toward this goal:

- Creating an awareness that Latin America exists
- Developing an understanding of some of the social and economic problems and the culture of a single country or region - an area small enough for the people to absorb
- Developing a sense of identity with a particular area - "my Partner"
- Personal identification with participants from the area.

b. Perhaps the greatest long term contribution of the Partners is the spreading of this awareness beyond the eastern seaboard, and the evidence is clearly visible on a visit to any of the state Partners in such matters as concern for projects in "their" country; continuity of personal and family relationships with former participants; press coverage for interviews and events that would not get an inch of space in metropolitan dailies; competition for trips even though the participants know that each trip will cost them money; endless hours spent in voluntarism, etc.

c. In this regard our study shows some significant observations on sports programs, citizen exchanges and cultural activities. While most development programs involve professionals or the relatively well-off, the sports program, not supported by AID, cuts through all social classes right into the barrios. Furthermore, sports provides one important area where the Latin Americans are making a contribution to the United States - an extremely important aspect of a Partnership and a program of mutual understanding - notably the improvement of soccer coaching and playing in the United States.

The citizen exchange programs in which, for example, a plane-load of Georgians visits Pernambuco and a return plane-load of Pernambucans visits Georgia play significant roles in creating this base of understanding. Living in each others' homes, participating in seminars, and seeing living conditions in the area is

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\* Recommendations for Other Effects will be grouped at the end rather than following each set of findings.

not plain tourism; it begins to create understanding. In the case of Georgia, many of the development projects have come as a spin-off from the increased awareness and the desire of participants to do something about the problems they have observed. Cultural exchanges, particularly folklore activities help create empathy and give students an exposure to a different culture in art, music, and dance. It provides a base on which others can build. As an example, a Bolivian Folk music group spent more than a month performing in the schools of Utah and a high school band performed in the schools of Venezuela. By themselves not important, but a beginning of direct exposure to a different culture. On an even broader scale, a folklore group from Cali performed in South Carolina and the program was taped and rebroadcast on educational TV networks for viewers throughout the state.

- d. Another significant finding from the study shows at two levels:
- Reinforcement of state interests in the Partner country
  - Professional contributions to development

Where the Partners program is supportive of broader interests of the state, it can draw on the assistance of many individuals and institutions. South Carolina is interested in more international trade and investment and Governor Edwards plans a spring visit to Cali. Illinois has opened a trade office in Sao Paulo. Tennessee has appropriated funds for the Partners because it sees Venezuela contributing culturally and financially to the educational community in Tennessee and medical faculty see visits to Venezuela as providing the kind of stimulus found in a sabbatical program which the University of Tennessee does not have.

The same reinforcement feature appears at the professional level. Work with the Latin American Partner provides an additional challenge. The specialists working with the "limited resource farmers" in their state, want to test applicability in another environment; the specialists in the preschool child want to extend their skills into the barrios; the specialists in rehabilitation see the need and the opportunity in Latin America for use of non-professionals in rehabilitation or the challenge of changing Latin American attitudes toward the handicapped. In the process of working in Latin America, our findings show that the participants recognize that they are broadened by the experience and their institutions recognize that their contribution in the U. S. is enhanced.

- d. Involvement in the Partners has profoundly affected many people. Unfortunately the programs have been too limited in numbers of people involved and in geographic coverage to reach their full potential.

B. A Change in Attitude Towards Latin America, among U.S. Participants

1. Findings

- a. As far as can be observed the involved Partners have no particular sense of "Latin America" but they do feel a closeness to the Partner country and to the people of that country.
- b. As a part of that feeling some of the Partners feel much closer to the Embassy of their Partner country than they do to the Department of State or AID. This is understandable, of course, because the Ambassador in some cases has made repeated visits to the state and the Embassy staff has been helpful in other ways. On the other hand, the only information they have on U.S. foreign policy or the AID program is what they glean from the local media. Furthermore, until recently AID mission directors have made no special efforts to visit their Partner states, in our judgment a serious oversight in relation to volunteers whose only reward is a sense of appreciation for their hard work.
- c. Without attempting domination or propaganda, it appears entirely responsible for AID and the Department of State to provide the state Partners with background information which will give them a frame of reference for their work.
- d. In sum, a combination of four elements can contribute to a gradual change in attitudes towards Latin America:
  - Increase in the number of Americans participating in development, cultural and sports activities as well as citizen exchange programs;
  - Expansion of activities in which more and more citizens get some exposure to activities involving Latin America;
  - Publicity designed not only to describe Partner activities but to put these in a proper context;
  - Background information from the Department of State and AID which gives the Partners a frame of reference for their activities.

C. The Degree to Which Latin Participants Develop a Greater Understanding of the United States Through Their Involvement in the Program

1. Findings

a. Response to this question must address three areas and cannot in any event be measurable as it has to be a summation of impressions in the visits to eight U.S. Partners and to their Latin American Partners.

- (1) Directive Groups - there probably is relatively little change among board members and committee chairmen who usually have some strong ties with the United States. Basic friendliness may be reinforced by closer relationships with particular individuals or disturbed by irritations caused by delays, difficulties in communication or what are considered to be slight.
- (2) Committee members and participants in Latin America - many Latin Americans suffer from various stereotypes of the United States, actually know very little about it, and have little contact with Americans in a work situation.

The volunteers in the Partners program often provide the only working level contact that Latin Americans in institutions serving the poor have had with Americans trying to help solve problems. The volunteers have some of the same impact as the early Point IV technicians and the Peace Corps volunteers. But the positive influence of this image is extended beyond those who have personal contact by the publicity that often accompanies or follows the visits. This publicity is particularly significant when the projects are of the type where there is a direct observable impact.

- (3) Participants in the United States - individuals coming to the United States under the Partners often work closely with Americans outside of large metropolitan areas and study in smaller institutions. Because they are "something special" they usually receive home hospitality and social amenities that are not as readily available to the AID participant or foreign student. This gives them an exposure to facets of life in the United States far different from the stereotypes they bring with them.

Teenage exchange programs under the Partners often build lasting family relationships and continuing exchange visits for years after the original visit.

English language training in Tennessee is leading to continuing professional study in Tennessee universities and family visits to areas off the normal Miami-New York tourist route and an understanding of a different part of the United States.

It is important to recognize however, that the language barrier is often a serious handicap to a better understanding of the United States. Often those who could benefit most cannot come because of lack of English and the inability of the state Partners to provide translation services except for short periods. Despite this limitation and cultural differences, most participants appear to return with a better understanding of the United States.

D. Support for the Aims of the "People to People" Program

1. Findings

- a. There can be no question that the Partners are in the mainstream of "people to people" programs. Even AID's emphasis on development, which is forcing increased use of professionals as volunteers and greater institutional involvement, is still within the "people to people" framework.
- b. It must be recognized, however, that the numbers who are concerned with social and economic development are much smaller than those interested in sports and cultural activities. Further, these activities are more dramatic and newsworthy than development. People to people programs must be built primarily around these more popular activities which in effect provide the basic interest on which interest in development and in Latin America can be built.
- c. Every U. S. Embassy we visited emphasized their interest in the Partners "people to people" activities as important to mutual understanding between the United States and the host country and the continuation of a flow of information, ideas, people, and trade in a two way north-south direction.

**E. Recommendations**

1. The membership base of the Partners program should be materially expanded so that the U.S. and Latin America can benefit more fully from the interest and talent in the program.
2. In the expansion of membership particular attention should be given to inclusion of the U.S. Spanish (Portugese) speaking community as a resource for service and to broaden bi-cultural understanding.
3. As a part of that expansion while increased attention should be given to development, the Partners should be recognized as an integrated whole of sports, cultural activities, citizen exchange as well as development.
4. The Partners need a better context for their activities and the Department of State and AID should provide the state Partners with information on overall programs and specific information about goals and objectives in Partner countries.

## XI. KEY QUESTIONS RAISED BY AID

During the discussion of the preliminary oral report on February 4, 1976, the evaluators were asked to focus their attention on three questions critical to AID relationships with the Partners. The questions were:

- A. The Institutional Basis of NAPA;
  - B. Continuity of AID Financing; and
  - C. Activities in Graduated Countries.
- A. The Institutional Basis of NAPA

Issue: The question of the institutional basis of NAPA relates to the second of the two broad questions in the scope of work ". . . to ascertain the success of the program in establishing a self-sustaining national association."

### Discussion:

1. As developed earlier in this report, the National Association of the Partners of the Americas is composed structurally of:
  - Forty-six Partners in 43 states - composed of, at most, a few hundred members in each Partnership;
  - Board of directors - composed of one representative from each of the 46 Partners;
  - Executive committee - selected by the board and linked to the policy-making body of the Partners of the Americas;
  - President of NAPA - selected by the executive committee; and
  - NAPA staff - selected by the president.
2. The Partnerships in the 18 Latin American countries are not part of NAPA.
3. Despite their relatively narrow membership base, the state and Latin American Partnerships are effective and reasonably viable based on:
  - committed, hard-working volunteers who are reasonably effective in carrying out development and people-to-people programs;
  - demonstrated ability to tap individual and institutional resources to meet Latin American needs in limited areas;
  - meeting minimal operational costs through the usual means of voluntary organizations;

- demonstrated ability to obtain services of volunteers whose services, if compensated, would far exceed the cost of AID's investment in payment of part of the cost of travel of the volunteers; and
  - their effectiveness in the involvement of key U.S. and Latin American leaders in participation and support of their Partners programs.
4. The viability of the state Partners is limited by:
- dependence on AID-supplied travel funds, averaging about \$12,251 per year in the Partners studied, as one of the strong incentive devices in the program;
  - their narrow membership base and limited fund raising capacity;
  - dependence on various services provided by the NAPA staff which is financially dependent on AID.
5. The major functions of NAPA are:
- image building;
  - service to the state Partners including approval of travel of Partner officers and volunteer technicians;
  - fund raising primarily from national public and private sources.

Analysis:

NAPA differs from many organizations in that:

- the president is not responsible directly to the membership but through the executive committee and the board of directors to the Partners;
- the NAPA staff's line of responsibility is to the president and only indirectly to the members which it serves;
- the Partners have little direct voice in the operations of the NAPA staff;
- the president and staff are not paid by funds provided by the members;
- the Partners have an associational relationship to the board and the executive committee; however, they are responsible to the president and staff for use of funds raised by NAPA.

Conclusions:

NAPA is not yet a viable institution because:

- it is heavily dependent on AID for funding; while some of the state Partners could survive without such funding, it is doubtful if the NAPA staff could survive;
- structurally, the members (Partners) are too far removed from a voice in the policies and operations of the NAPA staff;
- there is a reversal in normal role relationships because the Partners are dependent on the national office for financial support rather than the national office being dependent on the members;
- this relationship cannot be changed in fundamental ways until the membership base is significantly expanded along with an increase in the capacity of the state Partners to support the association.

As long as the NAPA staff is the principal raiser of the funds as well as authorizing officer for state Partner use of those funds, the current relationship is not likely to change. While there may be various alternatives that would increase the viability of the NAPA system, the most realistic would be a major expansion of the membership in the state Partners to a point where the members can be an important source of funding for the NAPA staff and travel activities. This fundamental change will not be easy and cannot be accomplished over night.

B. Continuity of AID Funding:

The second of the questions is critical because some feel that AID funding should go on indefinitely, but the AID program is considered temporary and the trend of AID development efforts in Latin America is clearly downward.

In the following paragraphs we identify the major problems that should be considered and present a solution which the evaluators believe is feasible.

Issue: How long should AID continue to fund the Partners of the Americas?

Discussion:

1. The interests of the United States in the Partners are broader than the concerns of the Agency for International Development.
  - AID's concerns are primarily related to the Partners as a resource for technical assistance and training in activities making significant contributions to development.

- The interest of the Embassies is in the Partners as an effective vehicle for "people-to-people" programs and for a two way flow of people, ideas and trade contributing to better understanding among the people of Latin America and the United States.
  - The interest of both the Department of State and AID begin to merge, especially in those countries where AID is no longer a major contributor of assistance to development, but where massive problems of poverty still exist and where it may be mutually beneficial to have American volunteers associated with efforts to improve the social and economic conditions of the very poor.
  - For effective relationships with Latin America, as well as an effective development program, the United States needs an informed electorate, and the voluntary participation of individuals and institutions in the Partners programs creates an awareness and concern that is basic to that understanding.
2. The trend of U.S. policy is toward a lower level of AID funding world wide and a concentration of AID efforts in the poorest of the poor countries. The effect of this trend is a curtailment of AID activities in Latin America, as only a few countries can be considered in the same class with the Sahel countries, Pakistan and Bangladesh. The thrust of this argument is to stop supporting the Partners and put the money into the Haitis, Paraguays and Bolivias.
  3. On the other hand, there are critical social and economic problems in every Latin American country which are of serious humanitarian proportions, contribute to political and social instability and almost invariably lead to anti-Americanism. Given the contribution that volunteers can make toward the solution of some of these problems and the need for better two-way understanding between the U.S. and Latin America, it is in the interest of the U.S. to have Americans identified with efforts to improve conditions of the poor in Latin America. Furthermore, continuity of funding would be consistent with the "new dialogue" initiated by the Secretary of State.
  4. The Partners, by themselves, cannot solve these problems, because they are best suited to help in the solution of second and third line problems. Beyond their substantial contributions, our survey shows, however, that the Partners have a potential that has not been fully developed for helping in problem solving and involving more American volunteers in working with Latin Americans to help improve the lot of the poor at a very nominal cost. It follows that it is in the interest of the United States that the Partners continue and develop their potential in the U.S. and Latin America.

5. This does not mean that the Partners should become an agency of the U.S. government, or that the U.S. should be its principal support, as it now is. It does argue the Partners should become a more viable institution with increased financial support from private and public donors and the members. It argues further, that because of the combination of considerations suggested above, the U.S. government should avoid precipitate action which would jeopardize the continuity and potential contribution of the Partners.

Recommendations:

The evaluators propose a four point program that will involve substantial changes in the Partner system, but will make the Partners a more viable institution and eliminate the need for indefinite AID financing:

1. AID funding on a planned descending scale over a period of three to five years, preferably five years, with provision, principally during the first two years, for special funding to facilitate the turn around;
2. A planned program for large-scale expansion of the membership and fund-raising by the state Partners to improve program quality, increase people and institutional involvement, and decrease the need for AID funding;
3. A special planned program by NAPA staff to assist the state Partners and the Latin American Partners in the turn around;
4. A planned program of guidance and assistance and related activities to strengthen state Partners and Latin American Partners and to improve fund-raising to replace the decreasing AID funds.

A chart suggesting the proposed scale of funding for these activities, which can be used for budgetary and program planning, is shown on the following page.

CHART I

SCHEME FOR AID PHASE OUT AND  
PARTNER BUDGETING AND PLANNING

Cost Categories	Fiscal Year						
	(Actual) Base Year	Per cent of Base Year					
	1975	1977	1978	1979	1980	1981	1982
Travel of Volunteers	100%	100	90	80	60	25	0
NAPA Staff Program Support	100%	100	100	80	50	25	0
NAPA Staff Central Administration	100%	100	90	80	50	25	0
Turn Around Activities	-0-	<u>1/</u>	<u>2/</u>	<u>3/</u>	0	0	0

1/ \$50,000 - \$75,000 for first year

2/ \$50,000 - \$75,000 for second year

3/ \$35,000 for third year.

Comment:

To elaborate on these recommendations the evaluators suggest that:

1. The following definitions be used:

Travel of volunteers to or from Latin America for program and project development, technical assistance and training activities related to economic and social development;

NAPA Staff Program Support - Assistance to the Partners in program development, structure, and operations:

NAPA Staff Central Administration - Those activities necessary to make NAPA an effective program as well as to direct staff activities, including such matters as fund-raising, image building, and the annual conference.

Turn around activities - Those activities needed to broaden the membership base, broaden program activities for economic and social development, improve operations in Latin America, etc. This category would include the funding of such matters as the various task forces and workshops proposed in this report, travel of Latin Americans to the annual conference, and assistance to the Latin American Partners.

2. The figures for turnaround costs of \$50,000-\$75,000 for each of the first two years and \$35,000 for the third year, are intended for planning purposes only; actual figures should be developed on the basis of budget proposals from NAPA. Included would be such activities as the task forces on: policy problems of membership expansion; guidelines for state Partnership evaluation; improvement of statistical reporting; workshops and/or panels on: planning and program and project development; fund raising; assistance to Latin American Partners and their travel to the annual NAPA conference. It should be expected that many of the other types of activities in this report would be absorbed by the NAPA staff.
3. An action program for membership expansion and fund-raising might include:
  - A workshop of state Partners and their Latin American colleagues to draw on the talents of volunteers in finding solutions to this critical problems. NAPA and AID, of course, should participate.
  - An action plan to increase membership involvement from all parts of the state and from functional areas that can contribute

to economic and social development.

- An action plan by each affected Partnership to raise say \$15,000 - \$25,000 per year from such sources as:
  - Broader Membership base
  - Business Organizations in U.S. and Latin America that might be willing to contribute \$2,000 - \$5,000 for particular projects and Partners administration.
  - Grants in the range of \$5,000 - \$20,000 from State governments and Latin American governments for support of Partnership activities.
  - Grants from individuals or localized foundations interested in volunteerism, in Latin America, or in specialized activities in agriculture, education, health, etc.
  - Continuation of efforts by NAPA to build its endowment and to obtain financial support from other sources as well as guidance to these states in this critical program.
  - Exploration by AID of the feasibility of use of PL480 funds for some Partner activities in some of the graduating countries.
  - Such other avenues of funding as the Partners may develop.

C. Activities in Graduating Countries:

1. Congress and the executive branch have agreed to concentrate AID resources in the poorest of the poor countries. This does not mean that other countries somewhat better off do not have serious development problems, but that there are more demanding problems elsewhere. Therefore, AID operations will be discontinued in Brazil, Colombia and Ecuador, as they have been already in Mexico and Venezuela. All these countries have serious development problems which will continue beyond the termination of the AID program.
2. More than half the U.S. Partners (Partnerships in 31 of 43 States) are in Partnerships with these countries. The states involved are:

California (Mexico)  
Colorado (Brazil)  
Connecticut (Brazil)  
Idaho (Ecuador)

Washington, D.C. (Brazil)  
Florida (Colombia)  
Georgia (Brazil)  
New Mexico (Mexico)

Illinois (Brazil)	Ohio (Brazil)
Indiana (Brazil)	Oklahoma (Mexico)
Iowa (Mexico)	Pennsylvania (Brazil)
Kentucky (Ecuador)	Rhode Island (Brazil)
Maine (Brazil)	South Carolina (Colombia)
Maryland (Brazil)	Tennessee (Venezuela)
Massachusetts (Colombia)	Virginia (Brazil)
Missouri (Brazil)	Washington (Ecuador)
Nebraska (Brazil)	West Virginia (Brazil)
New Hampshire (Brazil)	Wyoming (Brazil)
New Jersey (Brazil)	

3. AID activities will be continuing in practically all of these countries over the next three to five years, the period in which it is expected that AID support will be gradually replaced by funding from other sources. It would seem reasonable to continue the small sum of AID - supplied travel funds, perhaps \$10,000 - \$15,000 per year per Partnership during the transition period.
4. At the same time, NAPA should give priority in its guidance and assistance program and in the allocation of travel funds to the Partners of the poorest of the countries where the need is greatest and it is expected that the AID program will continue for some time in the future.

## I. SCOPE OF WORK - NAPA

### Purpose:

To determine the extent to which the activities being generated as a result of the efforts of the state partnerships and the national association contribute to the achievement of AID development goals, indicating the magnitude and significance of the effort and the type of people being reached through the Partners program; and to assess the success of the program in establishing a self-sustaining national association.

In undertaking the evaluation, the volunteer nature of the program as well as its people-to-people aspects will be taken into account.

### I. Background

The Partners of Americas program is made up of 45 partnerships in 43 U.S. States which are paired with 45 counterpart areas in 18 Latin American and Caribbean countries. The objectives of the program are to promote development, develop self-help attitudes, strengthen democratic organizations, broaden understanding and establish lasting friendships among the people of the United States and Latin America. The Partnerships' projects include activities in agriculture, education, health, community development, trade and investment. These programs, plus sports and cultural activities (not funded by AID) and the special education and rehabilitation (PREP) are serviced by the national association (NAPA).

### II. Plan of Action

In assessing achievement of the objectives, the evaluation team will review AID and NAPA's records, interview appropriate AID and Partners officials, staff, and volunteers, and visit seven to ten U.S. Latin Partnerships. These visits will include on site inspection of several projects for each Partnership, as well as interviews with appropriate officers of local and national government agencies and other local cooperating organizations.

Recently, new guidelines were established for the AID-financed project activities of the Partners of Americas program. According to these guidelines, the activities should as much as possible:

- help people to develop the capacity to meet their own needs.
- relate to or set up long range continuous programs designed to benefit the largest number of people.

- address the needs of the low income groups principally those at or below the poverty level.
- address the most basic human needs.
- address the needs of large numbers of people at low per capita cost.

The evaluation will assess (1) the extent to which present (and above new) project activities conform to the guidelines, taking into consideration that the new program began only a year ago, (2) the present and potential organizational capability to promote activities consistent with the guidelines, (3) the extent to which the organization's development activities reflect a conscious plan or approach, (4) the effect of past and current programs and (5) the extent to which NAPA's program objectives, as reflected in its Charter and by-laws, are consistent with AID development criteria.

The study will examine, but not be limited to, the following aspects:

1. U.S. State Partnerships

- (a) extent of local and statewide participation in the Partnerships as well as the degree of viability and effectiveness of the Partnerships;
- (b) number and scope of projects conducted annually;
- (c) ability and willingness of partnerships to promote, develop and implement self-help projects of a socioeconomic development nature with special emphasis on AID guidelines;
- (d) access to private funding and other support of projects;
- (e) dependence of the Partnerships on the program and administrative services of NAPA;
- (f) relationship between Partnership expenditure on projects and development aspects of projects, and
- (g) effectiveness of volunteer technicians travel and program and administrative services provided by NAPA in supporting developmental goals.

2. Latin Partnerships

- (a) extent of local participation within the Partnerships as well as the degree of viability and effectiveness of the Partnerships;

- (b) ability of Partnerships to promote, develop and implement self-help projects;
- (c) access to private funding and other support of projects; and
- (d) extent to which the Partnerships recognize the new guidelines and have the interest and ability to develop projects that meet developmental goals, with special emphasis on AID guidelines.

3. NAPA

- (a) effectiveness of NAPA leadership in encouraging Partnerships to develop projects with development impact;
- (b) criteria used to determine allocation of AID financing;
- (c) how often do development projects result from AID supported activities;
- (d) relationship between AID provided funds and the number of and efficiency of development projects;
- (e) measurable multiplier effect in project dollar values of AID funds channelled through NAPA, in terms of developmental projects;
- (f) effectiveness and efficiency of NAPA's efforts in:
  - i) generating support for the program from sources other than AID;
  - ii) becoming independent of AID support for administrative financing;
  - iii) servicing the Partnerships and promoting a national image for the program to the extent that it supports developmental efforts;
  - iv) improving Partnerships through regional workshops, committee organization and expansion, liaison with state-national organizations, publications or brochures and newsletters, and administering volunteer technician travel grant funds in terms of development impact abroad.

Other Effects

The evaluation should also ascertain to what extent the program results in "unanticipated" other effects -- positive or negative -- including but not limited to:

- (a) generating among U.S. participants a commitment to humanitarian and economic assistance for Latin America;
- (b) a change in attitude towards Latin America, among U.S. participants;
- (c) the degree to which Latin participants develop a greater understanding of the United States through their involvement in the program; and
- (d) support for the aims of the "people-to-people" program.

Recommendations

The evaluation should provide answers to the above questions and should also recommend type of evaluative measures and criteria which can be built into the project to provide future feedback on effectiveness, efficiency and significance of the Partners program.

ANNEX II

II: GUIDELINES APPROVED BY THE BOARD OF DIRECTORS OF NAPA  
FOR THE DEVELOPMENT OF LOCAL STATE COMMITTEES

1. A Constitution and/or By-Laws.
2. Elected officers with fixed terms of office.
3. Regularly scheduled meetings of officers, open to all membership, one of which shall be the annual membership meeting.
4. An Executive Director or Secretary to assist the Chairman.
5. Active membership of at least 15 representatives of a broad area of community activities.
6. Programs in at least two of these project areas:  
  
Education, Public Health and Medicine, Agriculture, Community Development, Cultural Affairs, Economic Development, Tourism and/or other areas of interest in the community.
7. Active Finance and Public Relations Committees.
8. Periodic bulletins to membership.
9. Semi-annual written activity reports (one of which shall be the annual report) to Partner with copy to Regional Association or Federation to be submitted by the end of June and December.
10. Regular radio, written, or both, communications between Partners.
11. Reply to all Partners project recommendations within a reasonable time from date recommendation received indicating acceptance or non-acceptance of projects.

Approved by Board of Directors  
November 16, 1974

III. SUMMARY DESCRIPTION OF PROJECTS  
STUDIED IN LATIN AMERICA

BOLIVIA - UTAH

1. Rural School Construction

Sixty two rural schools are completed or are under construction in this integrated project. In the U.S., Utah school children, who study about Bolivia and participate in cultural events, have raised funds for the construction of rural schools in Bolivia. Planning begins at the community level in Bolivia when the requesting community estimates needs as well as its own contribution. For those communities accepted as participants in the program, plans are then made for technical assistance in construction by Bolivian government engineers and for providing teachers when the school is completed. The value of each school has been estimated by USAID at \$10,000 or a total of \$620,000 with facilities provided for 500 school children.

2. Community Education

Based in a series of communities near Lake Titicaca the Partners developed a project for community education built around the use of the school building as a community center. The plan, which has the personal endorsement of the president and minister of education, has a one-year grant from the Mott Foundation for planning, coordination, and administration. The Ministry of Education has pledged the training in community education of 120 practicing teachers and 300 teachers in training. This project is expected to serve 44 schools with 3,000 children in the target communities with potential for reaching some 50,000 adults who will benefit from formal and non-formal education. If the project is successful the government anticipates the extension of the community education concept to other communities.

3. Dental Services

Twenty-two dental chairs and related equipment in excellent working condition have been made available by the Utah Partners for use in 12 regional social service agencies on the Altoplano. Thirty-thousand children have been treated through these dental units. To resolve the problems of transportation costs, for additional units the Bolivian partners have recently worked out an agreement in which the Bolivian drivers union will pay the cost of transporting 6 chairs to Bolivia if four are placed in union health centers.

4. Agricultural School

Plans were made for a pilot agricultural school in two communities. The school was to train 70 young people each year in growing grains and potatoes

and in cattle raising with teachers provided by the government. With the success of the pilot project, it was anticipated that the GOB would build similar schools to serve other rural communities. Unfortunately, a dispute between the two communities has stopped the construction and the future of the project is unclear.

## BRAZIL (PERNAMBUCO) - GEORGIA

### 1. Rehabilitation - Special Education Projects

This most active phase of the Pernambuco - Georgia program has developed in several different directions since the initial relationship began in 1970. During the first few years, attention focused on annual 3-4 day seminars for an average of 100-200 professional and semi-professional participants to fill in gaps in background and stimulate interest in further activity in rehabilitation and special education. In another phase of the program various types of training were provided in the U.S. and provisions were made for materials, books and tests developed in the U.S. In the most recent phase (October, 1975) Goodwill Industries, under sponsorship of the Partners, explored the feasibility of sheltered workshops and subcontracts with local industries. These projects have resulted in better service to the handicapped, but they have two broader objectives supported by NAPA's PREP program; (1) improved services to the handicapped, especially by drawing on the services of lay people and those without extensive professional training; (2) changing Brazilian attitudes toward the handicapped and modifying legislation that virtually excludes the handicapped from a productive role in society, e.g., physically handicapped persons cannot be employed by the government of Brazil.

### 2. Agricultural Projects

Reflecting a responsiveness to AID guidelines, new agricultural projects were negotiated between June and November 1975, with the first consultants scheduled to arrive in Pernambuco in February 1976.

#### a. Federal Rural University of Pernambuco - Strengthening Graduate Program

In one phase of the program, 15 rural university graduates will be admitted to a Masters Degree program at the University of Georgia starting with soil and water science, animal science and veterinary medicine. Georgia will provide assistance in developing a graduate reference library. Consultation will be provided over a two year period in curriculum design, staff development, research programs and planning of academic programs.

Although obviously too soon to judge its impact, this program has the potential of building a strong rural university over a ten year period because it grows out of the mutual interests of the two institutions, it is sponsored by top leaders of both institutions and is almost wholly self-financed. Because of its emphasis on applied agriculture, the results in improved services to the farmers should become visible within the next few years.

b. Extension Service

Two consultants from the Georgia University System are to work on the reorganization and restaffing of the extension service to provide for increased services to the farmers, and through increasing the number and role of women extension agents, to expand services to rural women. A further subject of the consulting services will be the integration of university training and research programs with the Extension Services' 12 experimental stations. Within the next few years the farmers and rural women should begin to receive better services to increase productivity and improve rural living.

c. Vocational Education - Agricultural

To improve the teaching of agriculture at the high school level, the University of Georgia is to provide assistance in organizing a placement center program for graduating students, developing a teacher exchange between Georgia and Pernambuco, developing a vocational education resource center and design of a curriculum for a graduate program in vocational education. As this program matures, there will be an improvement in the training of young men and women who will be working with farmers for increased productivity and better rural living conditions.

3. Federal University of Pernambuco

Under the terms of a project just getting started, Georgia will provide long-term technical assistance to the Federal University of Pernambuco, which has an enrollment of 20,000 students. This project provides for strengthening advanced program in Allied Health Services, Administration, and Urban Planning. As a part of this program, Georgia State has agreed to accept 5 Ph. D. and 10 Masters candidates. The end product of this program, largely funded by the Federal University, will be the strengthening of institutional resources for training in areas of critical need in the northeast of Brazil.

4. Citizen Exchange

Over the past three years, there has been a citizen exchange in which a plane load of 150 Georgians visit Pernambuco for a week and 150 Pernambucans

come to Atlanta for a week. With the exception of a few technical specialists, all pay their own way and are the house guests of local families, when possible, in the same profession. Starting as a straight "people-to-people" program, there is now an increased technical cooperation and development emphasis, e.g., three-day seminar for more than 100 professionals in special education, including design of materials for special learners and speech disability. Although difficult to assess the impact of this program, conducted at no cost to AID, it has been one of the principal forces for creating in Georgia an awareness of the problems in the northeast of Brazil and leading to a broadening of the areas of technical cooperation, which, over time, can begin to have a significant impact on the northeast.

## BRAZIL (SAO PAULO) - ILLINOIS

### 1. Drug Education Project

Brazil now has a national drug abuse education program which can be traced directly to the collaboration of the Illinois and Sao Paulo Partners. Dr. E.A. Carlini of the University of Sao Paulo Medical School, had been engaged in drug research since 1959. The State was interested in a drug education program which he started with help of \$3000 of seed money raised by the Women's Club of Illinois, linked to the Women's Club of Sao Paulo through the Partners, which enabled him to start a program for training medical students to speak to high school and University students. As an outgrowth of these early efforts, supported by the Partners, the medical school has become a center for training of medical students to talk to student groups about other problems. In the area of drug abuse, the program attracted national attention and in the period 1972-74, the medical students, after 3 months of training, gave lectures to 7000 groups of high school and university students. As a further effort, obviously with other inputs from other sources, the National Council of Drug Abuse has been transferred from the Ministry of Education to the Ministry of Health and there now is a national drug abuse education program.

### 2. Nurse Training/Education

With only 4000 certified nurses in Brazil, the Sao Paulo Partners have launched a program to raise the quality of nursing training and ultimately improve public health in Brazil. As the first phase of the project, the head of the school of nursing at Northern Illinois University made an exploratory visit to Sao Paulo in the fall of 1975. After extensive explorations and discussions, the director of nursing agreed to return in May, during Illinois week, along, as the second phase, with eight other nurses. The team will lead a series of seminars on curriculum planning, medical/surgical nursing, obstetrics, and community health.

3. Illinois Bicentennial Week

Plans are well advanced for Illinois Bicentennial Week in Sao Paulo in May 1976. The estimated cost of the program is \$700,000 - \$200,000 for expenses for the charter flight which will be paid largely by the individuals coming from Illinois and \$500,000 to be provided by sources in Sao Paulo. The Illinois participants will include a soccer team, jazzband, gymnast, ballet company, nurses, actors, sculptor and a 140 piece marching band, all to be house guests in Sao Paulo, plus another 190 who are paying their own way and will be staying in a hotel. As a part of its contributions, Sao Paulo will make available an exhibition hall which would normally cost at least \$50,000. The cost of constructing the booths, started in January, will be \$100,000. In addition to the cultural exchange, both Illinois and Sao Paulo expect this program to be mutually beneficial in promoting trade and investment.

4. Special Education Seminar

A special education seminar was held September 1-4, 1975, sponsored by the Faculty of Education of Sao Paulo University and Northern Illinois University. Participants came from universities, government agencies, and private organizations. As a result of the seminar, the various institutions have begun talking to each other, the coordinating committee has continued to meet and is exploring other programs and the Faculty of Education has made a decision to give priority to special education in its undergraduate program.

5. Resident/Intern Exchange

As a result of exploratory and planning visits between the PREP committees over several years, a Resident/Intern exchange is now under way between Abraham Lincoln Medical School of the University of Illinois and Santa Casa University. Starting in 1976, initially in the field of orthopedics and then expanding to other fields, carefully screened Brazilian students - and later interns - will spend a year in Illinois where they will learn U.S. approaches to medicine and residents from Illinois will get an opportunity to work in Brazil with types of medical problems not common in the U.S. with the objective not only of improving the training of individual participants, but also broadening the approach to medical training in both institutions.

COLOMBIA (SOUTHWESTERN) - SOUTH CAROLINA

1. Assistance to Institute for the Mentally Retarded

The Institute for the Mentally Retarded is a private organization with an enrollment of 160 children, ages three to 21. Enrollees are primarily the children of the poor who pay tuition from zero to \$30.00 per month. There is always a waiting list of 30 to 40. In this project, a team of a doctor and a

speech therapist from South Carolina reviewed the program, organization, and techniques used and helped introduce new methods of testing and tests which were purchased by the Institute from U.S. institutions, instructed the staff in new approaches and in new methods of therapy, and identified problems of structure and staffing and provided stimulus to the staff. The local Partners followed up on the leads provided by the visiting team leading to a complete reorganization of the institute and the designation of a professional with extensive U.S. training as the director. As a byproduct of these activities the director now conducts an outreach program to guide 200 parents of retarded children, who cannot be admitted to the institute, in improved home handling of these children. Beyond its immediate objectives, the Partners hope this outreach activity will be one step in changing Latin American attitudes toward the mentally retarded.

2. Assistance to the Institute for the Blind and Deaf

This institute founded in 1940 has 120 deaf and 30 blind students. The institute has a full school curriculum through high school. The institute had the services of the same team of a doctor and speech therapist which worked with the institute for the mentally retarded plus a separate visit by a specialist in problems of the blind. The major contribution of the specialists from South Carolina was the introduction of new methods of testing and interpretation of tests and the training of the teachers. The specialist in problems of the blind observed classes in the morning and conducted seminars in the afternoon. He made specific recommendations for changes. The techniques and methods introduced are in use. The idea of using the institute to equip students for employment has been introduced, but with its very limited resources, a change from the current academic program is not likely in the immediate future.

3. Visit of Folk Singer

A young singer specializing in the songs of southern Appalachia and attached to the Arts Commission in South Carolina, visited Cali under non-AID financing. Although the trip had been planned for some time, the Partners had only eight days notice for planning the specific program and materials for translation were not available, as requested, in advance. With much last minute work by the local Partners, a program was arranged at the conservatory of music, the U.S. and French bi-cultural centers, the Rotary club, plus several informal presentations. Perhaps the most lasting contribution was the taping of his presentation for study and reproduction by Cali Institute for Popular Culture and the folk-singer's interest in the different ethnic inputs in Columbian music which may lead to possible linkage between the Art Commission of South Carolina and the Institute for Popular Culture in Cali.

EL SALVADOR - LOUISIANA

1. Rehabilitation - Special Education Seminars

As a follow up on the NAPA - sponsored PREP (Partners Rehabilitation-Education Program) in 1972, three separate but inter-related seminars were held in El Salvador in 1973 which focused on the problems of improved services for handicapped children.

a. Special Education Seminar - February 1973

The seminar was intended to provide all professionals with a review of current U.S. theory and practice in special education and to be a catalytic force in the field of special education in El Salvador. All 50 professionals in the national institutes for the handicapped and the Ministry of Education participated in the two week full-time program. Based on interviews in January 1976, with 14 of the participants, the seminar achieved its objectives by stimulating other seminars and continuing individual study and demonstrating what could be done through well planned and executed in-service training. This training has contributed to the improvement of services to the handicapped in El Salvador.

b. Physical Therapy Seminar - October 1973

Seventy-five physical therapists participated in a seminar which provided some general background but concentrated in the areas of artificial limbs and braces, physical therapy and occupational therapy. Follow-up interviews in January 1976 showed that the therapists are still using techniques and methods learned in the seminar as adapted to materials available in El Salvador.

c. Speech and Hearing Workshop - August 1973

Forty Salvadorian speech clinicians, doctors, dentists, psychologists and social workers, participated in a seminar in August 1973, which included examination and diagnosis of patients, as well as technical discussion. The seminar reconfirmed the need for a multi-disciplinary approach to speech and hearing problems. Follow-up interviews in January 1976 confirmed that the techniques learned are still being applied. Perhaps the most tangible achievement of the seminar was a determination that the test used to diagnose speech problems was not suitable and the devising of a new test which is still being used, with minor modifications, by the institute for the handicapped.

2. National Center for the Deaf

Since 1973, teams of speech and hearing aid specialists have been making short visits to El Salvador for seminars for the staff of the center for the deaf, for donations of hearing aids and parts and repairs of hearing aids and other audio equipment. In 1975, there were 144 patients who received out-patient care at the center. Twenty seven received aids from the Louisiana Partners, 80 from other sources and 37 received no devices. Many more devices have been made available by the Louisiana Partners but are not being used because of unresolved problems of their usability in El Salvador. One further objective that has not been achieved involves a shift of center policy away from priority of aids for the younger children toward assuring that 15 or 16 year olds leaving the center have serviceable hearing aids which will be helpful in higher education or the job market.

3. Special Olympics

Responding to El Salvador's interest in vocational rehabilitation and sports, the Louisiana Partners provided El Salvador with two mini-gyms and were instrumental in obtaining grants from the Kennedy Foundation for participation in the Special Olympics for the mentally retarded. All mentally retarded children participated in the competition and four were selected to compete in Michigan. A fund raising campaign is now underway in Louisiana and El Salvador to establish a permanent institution for the Special Olympics with the broader objective of changing attitudes toward the physically and mentally handicapped so that they can become productive members of society.

4. Intensive Care Unit - Social Security Hospital

In August 1975, an intensive care unit opened in the National Security Hospital with a nursing staff trained through the Partners. As a result of the project all nurses in the unit have had special technical and applied training in El Salvador and/or Louisiana, 21% of all nurses in the hospital have had special training in intensive care, and an average of 3.5 patients per day are receiving care in the unit. According to the hospital director, the Partners project speeded establishment of the unit in its new quarters constructed at a cost of more than \$500,000. The director reports a drop of 14% in hospital mortality in the six months the intensive care unit has been in operation.

NICARAUGA - WISCONSIN

1. Philip Falk School - Las Palmitas de Rivas - 1968-76

The well at this school was dug by the community and the pump supplied by Wisconsin has been installed and is serving the community. The storage tanks, however, have not been constructed. Books sent by Partners are

housed in a secure area of the school which was built by the community and some use has been made of the books.

2. Children's Hospital - Rivas - 1969-76

This project was intended to expand the Red Cross building into a Children's Hospital. The exterior of the building has been nearly completed by local effort with financial help from the Partners. The hospital equipment sent by the Partners is in use in the general hospital as Children's Hospital has not been completed. The dental chair sent from Wisconsin is still in storage.

3. Granada - Waukesha Partner Cities Program

a. Road Construction

Granada has paved 5 kilometers of roads using equipment made available by its Partner and has become the third Nicaraguan city to have its own road equipment. Granada is now looking for a degree of independence from the national government in city construction activities.

b. New Cultural Experiences

Carroll College is using Granada as the area for an off-campus course in the college's New Cultural Experiences Program. This is an out-growth of sending a Waukesha baseball team to Granada. In January 1976, the first group of students and faculty and the baseball coach arrived and appeared to be having a successful learning experience and also to be contributing to the community, e. g., assistance in a child care center and teaching new games to young people.

4. Corn Island - La Crosse Health Center

Starting as a project to renovate a health clinic on Corn Island and to help the Corn Island Health Committee operate the project, the following has been accomplished: Joint decisions were made that renovation was impractical because of the extent of termite damage and that new buildings were needed; the new buildings were planned and the construction is on schedule and at a faster pace than proposed by LaCrosse; the Episcopal Bishop of Managua, who previously made all decisions, has turned over responsibility for operations and funding to the local group; the clinic has been reorganized and the staff reduced by the local committee from four to one; library shelves were constructed by the local people and books furnished by La Crosse are now in use; the clinic will serve a clientele of 500 to 1000 in the south end of the island far from the government facility at the north end; and the generator, in addition to meeting clinic needs, will provide electricity for 60 households in the vicinity.

5. Puerto Cabezas - Ft. Atkinson Partner City

a. Volunteer Fire Department

Ft. Atkinson supplied an old fire truck in 1971 which became the focus for organizing a volunteer fire department. The organization and truck fell apart after two years of fire fighting but the old truck became the symbol and catalyst for the current local community effort to rebuild the fire department with a new local committee, equipment furnished by the city of Leon, and training provided in January 1976 by the Nicaraguan fire fighters organization.

b. Scholarship Program

The Ft. Atkinson Methodist Church made available \$800 for scholarships for the Moravian School in Puerto Cabezas. Fifteen students received scholarships, four from remote villages. Four were high school students and one a fourth year primary student. There are no clear plans for continuing activities. At the time of the study, the Moravians were awaiting a response from Ft. Atkinson to their proposal for a continuing effort.

c. Homemakers School

Supporting a local initiative for a school for uneducated teenage girls, Ft. Atkinson partners provided cloth and other sewing materials which were hard to get and expensive in Puerto Cabezas. The course has now been in operation for three years, with 25 students enrolled in the first two years. Fifteen graduates have started to make a living in crafts and sewing, three are in high school and one is working as a secretary while she continues her high school education. Several knowledgeable observers interviewed independently stated that it is virtually certain none of these girls would be so employed except for the course.

d. Vocational Agriculture

Convinced of the need to provide vocational training in agriculture, a teacher in the government high school decided to start a course in applied agriculture. With no agricultural or gardening background, and little time to give the program, he obtained use of a plot of pebbly, uncultivated soil on the school grounds and obtained fresh garden seeds from the Ft. Atkinson Partners. As only a few seeds matured, the boys lost interest in the course. The teacher believes that, based on lessons from this experience, he can make the program go and is planning again to request seeds from the Ft. Atkinson Partners.

e. School Supplies Program

As school supplies cost twice as much in Puerto Cabezas as in Managua, the Puerto Cabezas Partners requested funds from Ft. Atkinson to help set up a revolving fund to reduce the costs to the students. Ft. Atkinson raised the money for a \$350 grant. The Puerto Cabezas Partners estimate that 1000 students benefitted from the cheaper supplies the first year and 2000 in all six schools will benefit in each future year. The local Partners handle all matters of logistics, record keeping and reporting. No further contributions are anticipated as it is expected that the revolving fund will be self-sustaining.

f. Community Dental Program

As an outgrowth of annual visits by Wisconsin dentists, a local dentist, who is president of the Puerto Cabezas Partners, identified dental hygiene- especially brushing of teeth- as a principal need among the poor. Conducting several sessions in the schools, he received no reinforcement and support from the teachers. From this experience he developed a plan for a seminar in February 1976 to consider and implement a more comprehensive local program. This seminar to consider his proposal will include Wisconsin dentists, representatives of the Ministry of Health and community representatives. If his plan is implemented, dental students will conduct community education programs which will include topical fluoride applications to the children and insertion of temporary fillings which should last at least until most of the children leave school.

6. Managua Politechnical Institute

The politechnical institute was established in 1968 as a private non-profit organization for post-secondary technical education. After the earthquake the Wisconsin Partners provided funds for equipment for the institute's home economics and industrial arts workshops and for building the nursing school facility. The equipment has been in place since November 1974 and the facility was completed in March 1975. Each year twenty home economics students enter the three year program and fifteen enter industrial arts. In addition, 180 secondary school teachers have been enrolled in 12-week courses. The nursing school has 120 regular students and 180 evening students. The Partners are now exploring long-term relations with the director visiting Wisconsin in February 1976 to examine vocational institute curricula and to explore additional areas of collaboration.

7. East Coast Rural Health Program

This project is centered in Puerto Cabezas, a misquito-speaking area on the east coast largely outside of the development program of the Government of Nicaragua. The program works through 6 medical clinics in isolated rural

communities and 35 health centers in small rural villages. Several thousand villagers are receiving medical treatment and health education who otherwise would have no services. Over a hundred U.S. graduate and medical students have done research and provided direct assistance to the staff and villagers and 30 Nicaraguan medical students have had exposure to and provided services to the "poorest of the poor."

## PARAGUAY - KANSAS

### 1. Mental Health

This project, in operation since 1971, is designed to contribute to improvement of mental health services in Paraguay. Thirteen people have made visits to Kansas or Paraguay for training in early diagnosis of learning disabilities, social service delivery, screening and treatment of the mentally handicapped, and organizational development. This program is reported to have significantly improved the techniques used by mental health professionals in the analysis and treatment of problems. Plans for 1976 include exchanges of thearapists, exchange of literature and films and Kansas involvement in a community mental health needs assessment in Paraguay.

### 2. Agricultural Pest Control

In 1975, three graduate students from Kansas State visited Paraguay to investigate the types of insects which affect various crops and to explore the possibility of inter-university cooperation in a program of insect control, especially for wheat, an important Paraguayan crop, and farmer education in insect control.

### 3. Home Economics Extension

Using a questionnaire designed in 1975 by a Kansas Partner throughly familiar with Paraguay, a pilot home economics needs assessment will be undertaken in two pilot communities with the expectation that it will then be administered to 25 other communities by the Home Extension service. This project will aid the Paraguayan agency in focusing its services and training on the principal identified needs in the communities surveyed.

### 4. Hospital/Medical Equipment

After long delay and innumerable complications, 25 tons of hospital and medical equipment arrived in Asuncion. Kansas had offered the equipment and Paraguay accepted, but with little joint planning for its use. Most of the used equipment had to be painted or repaired. Over 20 institutions obtained materials, some of which is in use. In some instances, however, the Childrens Physical Rehabilitation Center, for example, lacked the capacity to use some of the donated equipment.

## VENEZUELA - TENNESSEE

### 1. Preschool Education

Phase One of this project started with a 1975 visit by the director of preschool education at Memphis State, which included a survey of Venezuelan needs in the area of the preschool child; identification of 5 child care centers in the poorest neighborhoods and consultations on their programs; a seminar for professionals which included plans for follow-up work with the five centers, and plans for a large scale seminar early in 1976. Phase Two was the seminar which had been planned for 80 people for two weeks. The demand was so great however, that two one-week seminars were held with 150 participants each week, and the Tennessee group was unable to accept an invitation to stay for a third week. This seminar reached people at all levels and in all institutions related to child care of the poorest of the poor in Venezuela, and provided an opportunity to follow up on the remarkable changes effected by the Venezuelans in the five centers. The immediate impact of this Phase will be the improvement in concepts and techniques for child care programs throughout Venezuela, and a potentially significant change in the way of life of people in the Barrios who are not affected by Venezuela's oil economy. The indirect effect of this phase may be in the changes in public policy growing out of the First Lady's active participation in the seminar and in particular, her participation in the evaluation session in which much criticism was leveled against policies and practices of the Ministry of Education. Phase One and Two were carried out at a cost to AID, through NAPA funding of travel, of \$2462.56. Plans for Phase Three had not been completed at the time of the study.

### 2. Medical Exchange

Building on long relationships between doctors in Tennessee and Venezuela through the Partners, the first phase of the current program began in August 1975 with a seminar of 6 doctors from the School of Allied Health Services, University of Tennessee, and 15 Venezuelan Doctors, including the then Chairperson of the Venezuelan Partners, the Dean of the Medical School and the Vice Chancellor of the Central University. Three subjects of common interest were explored: Modernizing Medical Education; Clinical Research and Funding for these activities. As an outgrowth of the meeting, arrangements were made for continuing relationships among medical specialists in both countries. Study visits were arranged to Tennessee, leading to incorporation of some new materials and approaches in individual courses, and the university enacted legislation authorizing some curriculum change. Meanwhile, the Chairperson of the Tennessee Medical Committee has been pressing by correspondence, for significant changes in the Venezuelan Medical School program. The Chairperson of Venezuelan Partners is also pressing for that change. As a result, the director of Allied Health Services at U. T. and the medical committee chairperson will visit Venezuela in April. Their objectives are: imitation of allied health services by establishing common science classes, e.g., Physiology, for the medical and dental schools which

will begin to change in inflexible medical curriculum; development of a paramedical program which will provide supporting technicians who can eventually take over functions now performed by physicians; and introduction of a new program of community medicine, designed to improve the delivery of health services to the poor. Should these efforts, which have some strong support in Venezuela, be successful, this program can have far-reaching effects on medical education and health services to the poor in Venezuela and this could prove to be a pilot undertaking for similar changes elsewhere in Latin America.

3. Language Training

The Partners, carrying out their mandate for improvement of social and economic conditions in the northern as well as the southern hemisphere, were responsible for initiating a program that responds to the needs of Tennessee and Venezuela. Finding that Venezuela needed centers for English language training in the United States as a fore-runner of professional training, the Partners arranged for the Tennessee Commission on Advanced Education to explore the interest of Tennessee institutions in a program to serve the Venezuelans. University of Tennessee at Martin, expressed interest and a program for 12 Venezuelans was started through the Partners. From this beginning, 125 Venezuelans are now studying at U.T. Martin; more than \$250,000 has been paid in out-of-state tuition, mainly by the Government of Venezuela under the Gran Mariscal de Ayacucho program; and U-T Martin, a school with 5300 students and a purely local focus, has become a center for international activities and training. An active member of the Venezuelan Partners will participate in an evaluation of the program in the spring-summer of 1976.

4. Teenage Exchange

The teenage exchange is the oldest continuing project in the Venezuela-Tennessee Partnership. It was one of the vehicles for launching the Partners program with AID interest and support in 1967. This program continues to operate with no AID funding and word of mouth publicity in both countries. Each year 30-35 high school students from each country spend 6 weeks in the homes of host families, a total exchange over seven years of about 500 teenagers. Most are from middle and upper class families with at least one poor person provided free transportation in each group. Although difficult to assess, the impact of the program extends well beyond the participants; the teenagers maintain their relationships long after their visits and appear to build lasting bonds of understanding between the participants and their families. A joint Tennessee-Venezuela Partners evaluation of the program is now under way.

5. Community Development

A project has been developed for a three-part program of social and community development. The first phase of the program was for the selection by Fundacomun of Venezuelans for apprenticeships in Tennessee's area development offices. Second, the participants were to receive rotating assignments giving them an opportunity to learn from participation in varied social and economic community problems in the different parts of Tennessee. In the third phase staff of the area offices would participate in technical assistance and training in Venezuela. The program had the strong personal support of head of Fundacomun. When he was replaced in a change of administration, the project was placed in limbo. Both Partners are hoping to revive it in the spring of 1976 as a part of a general rebuilding of the Venezuelan program.