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**EVALUATION OF THE NATURAL
FAMILY PLANNING EDUCATION AND
TRAINING PROJECT OF THE
FAMILY OF THE AMERICAS FOUNDATION**

by

Deborah Rogow
Anna Flynn
Patricio Mena

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Population Technical Assistance Project
DUAL & Associates, Inc. and International Science
and Technology Institute, Inc.
1601 North Kent Street, Suite 1014
Arlington, Virginia 22209
Phone: (703) 243-8666
Telex: 271837 ISTI UR
FAX: (703) 358-9271

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Table of Contents

Glossary	iii
Acknowledgments	v
Executive Summary	vii
1. Introduction	1
1.1 Project Background	1
1.2 Purpose of Evaluation	1
1.3 Evaluation Team	1
1.4 Evaluation Methodology	2
2. Production of BOM Materials	5
2.1 BOM Film	5
2.1.1 Assessment of Film	5
2.1.2 Production Issues	7
2.2 Other BOM Instructional and User Materials	9
2.2.1 Teaching Posters	9
2.2.2 BOM User Kits	10
2.2.3 Book and Slide-Tape Presentation	11
2.3 Summary Comments on Materials Overall	11
2.3.1 Cultural Appropriateness	12
2.3.2 Field Use of the Materials	12
2.3.3 Remaining Need for Materials for Use in Multi-Method Family Planning Programs	13
3. Training Activities	15
3.1 Curriculum	15
3.1.1 Strengths	15
3.1.2 Weaknesses	16
3.2 Training Workshops	17
3.2.1 Strengths	17
3.2.2 Weaknesses	18
3.2.3 Issues/Concerns	18
3.3 Application of the Curriculum and Training in the Field	20
3.3.1 Application of the Curriculum in the Field	20
3.3.2 Application of the Training in the Field	20
3.4 Qualitative Impact	21

3.5	Overall Impact of Curriculum and Training	23
3.6	Remaining Demand Among BOM/NFP Programs	23
4.	Distribution of the Materials	25
4.1	Distribution to FAF Graduates and the FAF Network	25
4.2	Distribution to Other NFP Organizations	27
4.3	Distribution to A.I.D./Washington	28
4.4	Distribution to Cooperating Agencies and USAID Missions	29
4.5	Summary Comments on Distribution Overall	30
5.	FAF Administration/Staff	31
5.1	Overview	31
5.2	Administration/Staff Strengths	31
5.3	Administration/Staff Weaknesses	32
6.	Cooperating Agency Relationship with A.I.D.	33
6.1	Lack of Cooperation on the Part of FAF	33
6.2	A.I.D.'s Review and Approval Process	33
6.3	Summary Comments on Cooperating Agency Relationship with A.I.D.	34
7.	The Approval Process for the Project	35

List of Appendices

Appendix A	Scope of Work
Appendix B	List of Persons Contacted
Appendix C	List of Documents Consulted
Appendix D	Sites Visited
Appendix E	Substantial Involvement Understandings Clause
Appendix F	Reduced Reproductions of the Teaching Posters
Appendix G	Comments of One Evaluation Team Member

Glossary

A.I.D.	U.S. Agency for International Development
BOM	Billings Ovulation Method
CTO	Cognizant Technical Officer
FAF	Family of the Americas Foundation
IEC	Information, education, and communication
IFFLP	International Federation for Family Life Promotion
INTRAH	Program for International Training in Health
LARFPC	Los Angeles Regional Family Planning Council
NFP	Natural family planning
PATH	Program for Appropriate Technology in Health
S&T/POP	Bureau for Science and Technology, Office of Population, A.I.D.
TOT	Training of trainers
USAID	U.S. Agency for International Development - Mission offices
WOOMB	World Organization/Ovulation Method/Billings

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The evaluation depended heavily on written input from FAF participants, A.I.D. Cooperating Agencies, and USAID missions. Their contribution to this document is fundamental.

Executive Summary

Introduction

This is an evaluation of the A.I.D. Cooperative Agreement with the Family of the Americas Foundation (FAF). This agreement provided FAF with \$1,983,777 between 1984 and 1988 to carry out activities whose goal was to make information on natural family planning (NFP)* more widely available, primarily in developing countries, in order to expand the choices available to couples who wish to plan their families.

The Cooperative Agreement stipulated that FAF was to implement an information and training program directed toward the following:

- Producing and distributing a film on the Billings Ovulation Method (BOM)** for family planning service workers;
- Producing and distributing educational materials for teaching and practicing the BOM worldwide (these materials included teaching posters and user charting kits in five languages -- English, Spanish, French, Portuguese, and Arabic -- as well as a teaching curriculum, book, and slide show in English, Spanish, and French); and
- Developing and conducting a U.S.-based training course for 250 participants from around the world (but primarily from Latin America) who wished to become BOM teacher trainers.

Project Impact

- The Film. There has been no positive impact on the ability of family planning programs to inform clients about the basic fertility cycle or about natural family planning (NFP), as the film directed toward this audience was never made. Therefore, family planning programs will continue to be deficient in these areas and in their attempts to provide informed choice on all contraceptive options. It is important to note that the current film could easily be adapted for this audience by an organization that is accustomed to and comfortable with family planning programs.
- Materials Development. The materials produced are generally, but not uniformly, technically accurate, visually attractive, and durable. Both field responses and professional review indicate that the teaching posters are the most useful among the materials produced, while the user kits are the least useful. There are, however,

*The term "natural family planning" describes methods of planning or preventing pregnancy based on periodic abstinence and that rely on women's observations of naturally occurring signs and symptoms of the fertile and infertile phases of the menstrual cycle.

**BOM or the cervical mucus method of NFP is based on self-observation of the changes in the texture and quantity of the mucus produced by the cervix (neck of the uterus) that are detectable at the opening of the vagina (vulva) and that occur throughout the menstrual cycle under the influence of different hormones.

some fundamental questions about the cultural appropriateness and practicality of the materials produced. In addition, no target audience pretesting was done on any of the materials.

- Training. The long-term impact of the training will be to professionalize, standardize, and increase the training of new BOM instructors. It will also be to increase the public profile of the trainers in their countries as they carry out promotional and policy activities with greater confidence. In most cases, these activities are aimed at promoting NFP. In some cases, however, participants developed more negative attitudes toward other contraceptive methods and/or more motivation to denigrate these methods, and are attacking the family planning agencies that provide these methods. Where this is true, the training may result in aggravating the conflictive relationship between NFP and multi-method providers. Continued biases on both sides will only produce misinformation which acts against the informed choice of the public.
- Overall Impact of Activities on NFP User Levels. Although any potential long-term impact on BOM use cannot be conclusively analyzed with the currently available data, three to four years after most participants received their training and materials, there appears to be little to no significant impact on general user interest in the Billings Ovulation Method.

Project Implementation

The BOM Film

FAF failed to comply with several aspects of the Cooperative Agreement with respect to the film. First, FAF did not respect the originally defined film audience. As a result, there is still no film on NFP appropriate for family planning service providers. However, portions of the current film (and possibly of the preprint and original footage) are adaptable for the originally intended audience.

Second, the Cooperative Agreement stated that FAF was to deliver all original footage, preprint materials, and the master print to A.I.D. There is some dispute as to the technical definition of the "master print" and whether that has been delivered. It is more important to note, however, that FAF has not delivered either the preprint materials or the original footage, which is in fact what is required to continue generating new "internegatives" for new prints and/or to adapt the film. FAF has further demonstrated its sustained intent to relinquish as little control of the film as possible (content as well as materials); there is some concern that a misunderstanding over the master or internegative version of the film may have been influenced by this intent.

The evaluation team considers these failures to comply with the deliverables as described in the Cooperative Agreement to be of a serious nature.

Curriculum and Training

The training workshops appear to have been well organized and the faculty was appropriate (with the exception of the instructor of the French courses who spoke no French). Although the curriculum is lacking in some important pedagogical and didactic areas, most basic information is included and is generally technically accurate. The curriculum remains a useful document, particularly as a reference tool.

Concerns about how FAF conducted the training include 1) FAF's rigidity and lack of cooperation in respecting the priorities and guidance of A.I.D. in the selection of countries and participants, in the issuance of invitations to take part in the training, etc.; 2) FAF's apparent failure to exercise caution in avoiding treatment of controversial topics beyond the content of the curriculum; and 3) the overwhelming amount of administrative backstopping required of A.I.D. staff to assist FAF in the implementation of training-related activities.

Distribution of Materials

Because FAF's final report is incomplete and inadequate in its reporting of distribution, and because shipping was poorly administered, the evaluation team's findings on distribution raise as many questions as they answer. It was not possible to conclude definitively whether all materials were distributed by FAF during the project period, or if the materials produced with A.I.D. funds were all distributed free of charge. Only a careful fiscal audit of FAF's books and records and/or a more specific questionnaire about the number, time period, and price of materials received would resolve this issue.

It was possible to determine, however, that the teaching and user materials were made more available to NFP programs of which FAF approved and less available to those of which it did not approve. This approval appears to have been based on how closely each organization came to FAF's philosophy about family planning and NFP. As such, the International Federation for Family Life Promotion (IFFLP) had more access than Georgetown University, for example. A.I.D. Cooperating Agencies and USAID missions, and A.I.D./Washington had the greatest trouble obtaining materials. Such uneven treatment of Cooperating Agencies appears to violate the spirit of procedures for the conduct of A.I.D. Cooperating Agencies.

Cooperating Agency Relationship with A.I.D.

The stormy and intense review process associated with this project indicates a lack of cooperation on the recipient's (FAF) part. In the view of the evaluation team, FAF cannot be called a "cooperating agency" of A.I.D. in any meaningful way, and failed to respect both the letter and the spirit of the terms of the Cooperative Agreement.

For its part, A.I.D. appears to have engaged in a thoughtful but exhausting effort to make the materials produced by FAF more responsible, accurate, and appropriate, but eventually gave up. When the review and recommendation process failed to bring about an acceptable resolution, however, perhaps the project's Cognizant Technical Officer (CTO) should have continued insisting on changes and even brought the project to a halt.

A.I.D.'s formal approval at each stage of the project appears to have been given for a variety of reasons: A.I.D. staffs' frustration with the lack of responsiveness on the part of FAF to proposed changes; the desire not to delay or cancel production; the disproportionate amount of time this project was demanding of A.I.D. staff; a possible failure to recognize that not all outputs were being delivered; and there may have been political pressures within A.I.D. that precluded bringing the FAF project to a halt for technical reasons. In addition, the Cooperative Agreement did not specifically require that materials developed by FAF be field tested before production, a technical requirement that A.I.D. assumed would have been part of any materials production project.

Although refusing approval or obtaining professional pretesting might have allowed A.I.D. the control it needed to avoid or resolve disputes, it is possible that neither measure was feasible. Nor would these measures have substituted for having a cooperative and flexible recipient agency: It is reasonable to assume that the work might have been accomplished more efficiently and with less frustration on both sides if there had been more tolerance and flexibility on the part of FAF.

Project's Funding Process

A review of project files and discussions with A.I.D. staff involved in the project indicated that A.I.D.'s decision to fund this project may have been due to the influence of some members of the U.S. Congress.

Because a possible integration of religious doctrine into the NFP training courses carried out by FAF might have had the net effect of advancing religious doctrine and fostering excessive entanglement with religion, there is also concern that A.I.D., in supporting this project, may have violated the establishment clause of the First Amendment to the U.S. Constitution, which precludes the use of tax revenues for activities other than those that are purely secular.

Recommendations

1. A.I.D. should secure all original (including the 35mm) footage and preprint materials for the film immediately and make internegatives or prints available to FAF as needed.
2. A.I.D. should arrange for the film to be adapted in order to make it more appropriate for family planning service workers. This adaptation should be carried out by an agency such as the Program for Appropriate Technology in Health (PATH), The Pathfinder Fund, or Johns Hopkins University, with technical collaboration from Georgetown University. (Any treatment of BOM in an adaptation should, of course, adhere to any copyright conventions that might require the Billings' authorization for any adaptation or change.)
3. A.I.D. should support broad-scale efforts to develop training and user materials that will allow multi-method programs to incorporate into the cafeteria of contraceptive options basic information about fertility and its application to family planning, including referral to NFP programs. The evaluation team views such efforts as a major strategic recommendation for narrowing the gap between NFP and multi-method providers. These information and training efforts should be carried out by a collaboration of population organizations (that are open to NFP) jointly with NFP organizations (or individual consultants) that are equally willing to support multi-method approaches.
4. In future contracts and Cooperative Agreements that involve materials development, A.I.D. should ensure systematic pretesting in the target audience by qualified experts as part of the development process.
5. In places where distribution of more BOM instructional materials is a priority, there should be independent testing, with the posters taking precedence. However, given that user data indicate a probable greater need for NFP promotion (and possibly institutional development) than for more materials, extensive retroactive field testing of all the materials produced by FAF is not indicated at this time.

6. A.I.D. (and its umbrella projects) should fund only those agencies that can demonstrate a willingness and ability to cooperate with A.I.D. and other Cooperating Agencies and that conform with A.I.D. population policy. In the field of NFP, such organizations do exist.

1. Introduction

1.1 Project Background

Funding for the Family of the Americas Foundation (FAF) Cooperative Agreement began in 1984 at the level of \$1,100,000 for multi-lingual materials development (film, posters, and kits) and training of Latin Americans in the Billings Ovulation Method (BOM). The primary objective of the project in the proposal submitted by FAF and agreed to by A.I.D. was to make information on natural family planning (NFP) more widely available, primarily in developing countries, in order to expand the choices for couples who wish to plan their families.¹ The project was seen as an interim measure until a large-scale, general NFP procurement was designed (which eventually was awarded to Georgetown University).

The original specific aims of this project were the production of educational materials to be used in teaching and practicing the Billings Ovulation Method of NFP worldwide, and the training of BOM instructor-trainers from Latin America. Various amendments extended the project and brought the total funding to \$1,983,777 to allow for the training of Asians and Africans, production of further materials (book and slide-tape), and cost overruns.

The project was completed in 1988. FAF has since requested support for another cooperative agreement to translate the materials into five additional languages. This request was handled by A.I.D.'s NFP umbrella project at Georgetown University. Because A.I.D. is currently considering funding another project with FAF, this evaluation has immediate practical applications as well as retrospective lessons.

1.2 Purpose of Evaluation

This external end of project evaluation had a two-fold purpose: 1) to assess FAF's progress toward delivering outputs and achieving objectives stated in the Cooperative Agreement²; and 2) to document lessons learned from the implementation of this Cooperative Agreement about information, education, and communication (IEC) and training with respect to NFP, specifically the Billings Ovulation Method.

1.3 Evaluation Team

The team that conducted this evaluation consisted of three professionals with a range of expertise including education, training, research, and materials development. The team members have worked with both NFP and multi-method family planning in developing countries. In addition, the team represented linguistic capability in Spanish, Portuguese, and French, as well as English.

¹The term "natural family planning" describes methods of planning or preventing pregnancy that are based on periodic abstinence and that rely on women's observations of naturally occurring signs and symptoms of the fertile and infertile phases of the menstrual cycle. The Billings Ovulation Method (or cervical mucus method) of NFP is based on self-observation of the changes in the texture and quantity of the mucus produced by the cervix (neck of the uterus) that are detectable at the opening of the vagina (vulva) and that occur throughout the menstrual cycle under the influence of different hormones.

²See Appendix A, Evaluation Scope of Work, for the project objectives and deliverables as stated in the Cooperative Agreement.

The team selection process differed from the standard procedure followed for A.I.D. Population Program evaluations in that FAF maintained the right to 1) approve or reject formally each member of the team, and 2) nominate directly one team member. The final team was approved by FAF as well as by A.I.D.

Dr. Anna Flynn is a practicing gynecologist at the University of Birmingham, England. Dr. Flynn has served as Principal Investigator for England and Wales in the World Health Organization/BLAT six-country study to help design and pilot test the Family Fertility Education Learning package between 1978 and 1980. This package is a resource of learning materials that can be combined in various ways either to train NFP teachers or to teach those who wish to learn the method. Dr. Flynn was also the NFP consultant to the International Federation of Family Life Promotion (IFFLP) in the design and development of NFP programs in anglophone Africa, 1979-1981. Presently she is developing NFP teacher training programs in several European countries and in the United Kingdom.

Dr. Patricio Mena is Associate Professor of Obstetrics and Gynecology at the Universidad de Chile Medical Faculty, where he directs a large NFP education and research center. Dr. Mena has trained many NFP instructors and has carried out various research activities in the field of NFP. He also speaks frequently about NFP to professional audiences in Chile.

Ms. Deborah Rogow, MPH, has worked with NFP users and NFP programs in Brazil, Peru, Mexico, Nigeria and the U.S. She has extensive experience in international training (in both NFP and overall family planning) and with health education materials. She has also served as Principal Investigator for a longitudinal follow-up study of effectiveness and continuation rates among NFP users. Ms. Rogow served as team leader.

1.4 Evaluation Methodology

The evaluation team visited A.I.D. offices in Washington and FAF offices in Louisiana but did not make direct site visits to participants of the training courses or to users of the materials produced under the Cooperative Agreement. The team relied instead on a direct review of the materials produced, on interviews with staff at FAF and at A.I.D., and on a review of documents. These documents included responses to a questionnaire survey conducted by A.I.D. in preparation for the evaluation. The questionnaire survey elicited responses from the following groups:

- Participants of the training course (about the training, materials, and their impact);
- A.I.D. Cooperating Agencies (about the materials produced by FAF); and
- USAID missions (about the training course and about NFP demand).

The evaluation team also reviewed the responses of a follow-up questionnaire sent to participants by FAF and copies of reports of field site visits conducted by FAF to some of its trainees.

The participant responses suffer from two principal weaknesses as data sources. First, only about one-third of the participants responded to the A.I.D. questionnaire; a smaller proportion responded to FAF's questionnaire. Second, the responses involve self-reporting and are undoubtedly subjective. This may be a particular concern given the strong ideological commitment many of the participants have to FAF and its philosophy. Despite these limits, however, the participant questionnaires contained important data and comments.

Because of the response rate and the nature of the questions in each instrument, the evaluation team relied primarily on the A.I.D. survey for quantitative analysis and on both the A.I.D. and FAF surveys for qualitative analysis.

Other documents reviewed included the original Cooperative Agreement and amendments, the A.I.D. manual governing cooperative agreements, and various project files.

In most cases, the final external evaluation is conducted during the last month of a project, so that the evaluators can directly observe some of the project implementation and meet all of the key project staff. In this case, the project had ended eighteen months before the evaluation took place, the three individuals who had served as project director had all left FAF, and the training workshops had finished; there was therefore less "to observe" at FAF. On the other hand, the materials have now been reviewed by a wider audience over more time and there has also been more time to look at the impact of both the materials and the training activities.

Finally, because the approaches and perspectives toward NFP of the members of the evaluation team differ from one another, the team chose to carry out most of its work jointly, rather than to divide responsibilities. Although this process was more time-consuming, it ensured a consistency and evenness. This lengthy process was also particularly important because of the fact that one member of the evaluation team had been nominated directly by FAF.

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2. Production of BOM Materials

2. Production of BOM Materials

2.1 BOM Film³

This assessment is based primarily on viewings of the film by the team members as well as viewings with written feedback by various groups, including NFP and materials testing experts. Most of the professional reviewers (and one lay group shown the film for the explicit purpose of obtaining audience feedback) concur on the principal strengths and problems of the film. Although some BOM participants who viewed the film are enthusiastic about it, their comments are quite general. There has been no objective target audience testing for comprehension, acceptability, or motivational impact.

2.1.1 Assessment of Film

Description. The film, produced by Luigi Turola of Cineteam Realizzazioni Films in Rome, Italy, is a 28-minute, animated production. It explains the concept of the fertile and infertile phases of nature and the human female, female reproductive anatomy and physiology, how to keep a menstrual chart, the rules for achieving and avoiding pregnancy (including in special circumstances), and provides some general information about the effectiveness, advantages, and disadvantages of NFP.

The film is visually attractive, well produced, and the first ten minutes clearly sustain the viewer's interest. The narration (at least in the English version viewed by the evaluation team) and the music are well chosen.

Technical Accuracy. The film is generally accurate but does contain some omissions and confusing elements. One serious omission is that no mention is made of the fact that the viewer must obtain further instruction before using the method. There is a clear danger that, based on a one-time viewing of the film, viewers will begin using the method incorrectly. Another omission is that the film does not explain how the woman observes her mucus; it shows mucus on fingers yet states that touching of bodily parts is not necessary.

Another problem is that the subject of abstinence is so poorly treated in the film that it may become frustrating or misleading to the viewer. The challenge of coping with periodic abstinence is addressed in a few indirect words only at the very end of the film ("NFP requires motivation and self-control"). Compounding this vagueness is the fact that the menstrual cycle charts shown in the film repeatedly have only four pre-"peak" mucus or potentially fertile days. This gives the false impression that the average period during which a couple must abstain is shorter than is usually the case.

There is also an opening statement of dubious scientific accuracy, which accompanies a visual image of nature and plants, that says all living things "need two things: heat and water." As one educational expert who works with third world populations pointed out in a review of the film, "any poor farmer in the third world knows that plants need light and water."

From the production point of view, there are also a number of minor technical weaknesses that lead to confusion. Several times the text does not fit the image, for example: 1) the text states "sometimes nothing at all is borne from a seed" while the film highlights a seed

³A VHS version was also produced; throughout the report the term "film" will apply to this version as well.

growing, and 2) the text states that "occasionally the brain doesn't send the signal" while the visual shows the brain sending just such a signal. A similar problem is that while the narrator talks about the post-ovulation infertile phase, a blinking body under the peak days draws attention to the ovulatory period.

A further concern stems from the use of unscientific, anthropomorphic language about mucus and sperm: the sperm "wait for the right time to go meet the ovum" and that the "mucus behaves" in a certain way.

Finally, the stories of the two couples in the film may imply that a good relationship means frequent sex and frequent sex means a good relationship. This clearly fallacious implication could cause confusion and anxiety in viewers.

Confusion as to Intended Audience. The film is not appropriate for its originally intended audience, i.e., family planning service providers. FAF itself has stated that the film is for BOM users, teachers, and trainers. FAF has further stated that it never intended to make the film for the audience described in the Cooperative Agreement (i.e., family planning workers).

In addition, the film seems to display an utter confusion about its intended audience, which poses a major limitation on the use of the film, even within the BOM community. For example, the first segment of the film is technically appropriate for lay people, the second part for reinforcing instruction for users, and the last part is mixed as it includes both complex scientific information and basic information about the advantages and disadvantages of NFP. Indeed, the film was produced as three films in one, with brief blackouts after each segment. However, no instructions for using the segments separately have been developed; and although there is the possibility of adapting these segments for different audiences, none of the segments can stand on its own. Another concern has to do with varying degrees of sophistication and choice of language. The content and language of much of the film are in general too complex for most non-physicians (e.g., a section dealing with the rules for using the BOM method and its use during breastfeeding is extremely difficult to absorb), while other parts of the film are appropriate for a lay audience.

Without simplifying the content, language could be used that would be more understandable and explicit. For example, the use of "egg" in the English version would be better than "ovum"; and more explicit words could be substituted for the vague terms "conjugal relations," "physical union," and "intimate genital contact."

Cultural Appropriateness. Because none of the preprint film materials were audience tested, there are no reliable data on which to base an accurate assessment of cultural appropriateness. There are, nonetheless, questions about just how the intended audiences in different cultures would understand and respond to the imagery and content of the film. For example, there is a mechanical wheel-clock superimposed on a woman's abdomen to indicate cycles, and rain is superimposed on her pubic area to indicate fertile times. Are such images clear and acceptable? Is the image of a naked woman breastfeeding (or nudity in other parts of the film) offensive in some cultures? The woman in the film has no mouth; how do viewers interpret this image? The children from the family are almost all the same size; they differ primarily in skin color and the presence or absence of hair. Are these depictions familiar or disconcerting/confusing to viewers in different countries? What about the constant reference to the "husband and wife"? This may mislead some viewers into thinking that a woman can only become impregnated by her husband, and also ignores the fact that millions of couples live in relationships (e.g., polygyny, "free union", etc.) that do not fit the model described in the film. On the other hand, even though many family planning clients may not identify with the image of the married couple, the image is appropriate for the type of users toward which BOM programs are directed.

The choice of language describing fertilization as the "beginning of life," the accompanying music, and the discussion of NFP's applicability for achieving or preventing pregnancy as "freedom of choice" provide unnecessary and ideologically charged messages that could diminish the film's acceptability by a broader audience.

Impact. Finally, the motivational impact of the film is unknown. Although it may be a useful tool to complement training, there is no objective documentation of its effectiveness in convincing interested lay people or family planning workers to learn NFP. Although some participants report that the film is an effective promotional tool, the data on the number of new users do not appear to support this assessment.

The film will presumably continue to be shown to prospective users, in teacher training, and for promotional purposes. Despite the film's considerable limitations and problems, audiences -- particularly those already knowledgeable about and/or sympathetic to NFP -- will appreciate it.

Because the film is professionally produced and sophisticated it will lend tremendous credibility to those NFP providers who are able to use it. Again, despite its limits, it will also serve as an important adjunct tool to learning in the NFP community, i.e., for accompanying instruction and training. Although the film may cause some confusion and even resentment (among non-acceptors of BOM philosophy), instructors could compensate for the weaknesses of the film by showing only certain segments or providing appropriate explanations in a lecture; and in controlled promotional settings such as public lectures a moderator could compensate for some of the film's limitations.

2.1.2 Production Issues

The production and distribution of the film failed to meet the required project deliverables in two respects: 1) FAF did not produce the film for the intended audience as described in the Cooperative Agreement, and 2) it did not deliver to A.I.D. all original and preprint materials developed in the production of the film.

Failure to Direct the Film toward the Audience Specified in the Cooperative Agreement. In the "Program Description" section of the Cooperative Agreement it is stated that the "recipient shall perform an information and training program directed toward the production and distribution of a film on the Billings Ovulation Method for family planning service providers worldwide," and that "the principal purpose of the film is to serve as an audio-visual introduction to the Billings Ovulation Method for family planning service providers". Indeed, all formal documents for this project repeatedly and consistently refer to the film as being intended "for family planning service workers".

In its current form, however, the film does not fulfill its originally stated purpose. It is the opinion of both the Cooperating Agencies who have viewed the film and the evaluation team, that the film is only appropriate for BOM users and instructors and not for family planning service providers in its current form. (See above detailed discussion of the film.)

A review of the A.I.D. files documenting the review process for the film and interviews with A.I.D. staff indicated that A.I.D.'s focus on the intended audience was lost in an overarching conflict about the technical content of the film. The files document exhaustive efforts by A.I.D. during the review stages of the film's development to change the film to make it more scientifically responsible, technically accurate, and culturally appropriate, and specifically to make it appropriate for family planning service workers. The need for a film that could be used by those family planning service providers not currently involved in BOM teaching was stressed at all initial meetings as well as later during the project. An interview with A.I.D. staff indicated,

however, that their attempts to bring this about finally proved so frustrating that A.I.D. staff stopped putting pressure on FAF to meet this requirement.

The film could possibly be edited and adapted as an introduction to BOM for general family planning workers. The first ten minutes could be used almost intact and other brief segments could be salvaged. Although the evaluation team did not see the original footage and preprint materials, it is assumed that these may also contain material that would allow A.I.D. to adapt the film to fulfill the original objectives of the Cooperative Agreement.

Failure to Provide A.I.D. with the Original and Preprint Materials of the Film. The Cooperative Agreement states that "The master print of the film, plus all original footage and preprint materials, are to be the exclusive property of A.I.D. The Recipient retains permission to use the total film or any portion of it and to have additional copies made as required following the completion of the Agreement for additional programs of Family of the Americas Foundation."

To date no original footage or preprint materials have been received by A.I.D., and the issue of the "master print" has become a point of contention. According to A.I.D., the master print of the film referred to the original version used to make copies; this has not been received. FAF, on the other hand, considers the version used for copies to be the "internegative." FAF's original understanding and intent have been difficult to ascertain because of the contradictory statements it has made about the matter: at one point, FAF stated that the master was necessary to generate copies; at another time, FAF stated that the master is only the best 16mm copy available.

Because the ownership of the original materials of the film is a fundamental concern of the Cooperative Agreement and because A.I.D.'s ability to adapt the film for its originally intended audience depends on having such original materials, the evaluation team made a significant attempt to determine whether FAF adhered to both the spirit and the letter of this aspect of the agreement.

With regard to the technical interpretations of these terms, the evaluation team spoke with two independent filmmakers and a communications expert within A.I.D. about their interpretations of the agreement language. The evaluation team learned that the internegative is a clearer technical term than master print to designate the version used to produce multiple prints. However, it is more important to note that 1) the internegative itself is produced from the original footage, and 2) more than one internegative can be produced.

These facts are crucial because they mean that 1) regardless of who has or was intended to have the first internegative, there is no technical reason why A.I.D. and FAF cannot each have its own internegative; and 2) FAF has clearly retained the most crucial product, i.e., the original footage and preprint materials.

Recommendations⁴

1. A.I.D. should request from FAF immediate shipment of all preprint materials and original footage (including the 35mm footage) and any footage used to generate the "internegative." The consultant A.I.D. used on the film or another person conversant with film technology should be included in wording this request to ensure clarity about the materials being requested. The materials should be shipped via registered mail.

⁴Recommendations are numbered consecutively throughout the report.

2. A.I.D. should have the film adapted for the originally intended audience so it can be distributed via the Cooperating Agencies. It is suggested that the film adaptation be carried out by either the Program for Appropriate Technologies in Health (PATH), Johns Hopkins University, or The Pathfinder Fund in technical collaboration with Georgetown. (Any treatment of BOM in an adaptation should, of course, adhere to any copyright conventions that might require the Billings' authorization for any adaptation or change.)

2.2 Other BOM Instructional and User Materials

The Cooperative Agreement supported the production of various BOM educational and training materials for BOM instructors and users, including the following:

1. Teaching posters, which consist of a set of three double-sided posters: two summarize the rules of the BOM in both pictorial and written form for normal and special circumstances, and one depicts male and female reproductive anatomy and the parallel between the fertility cycles of women and the land;
2. A BOM users kit, which consists of an 8-panel chart and descriptive stamps as outlined in the Cooperative Agreement;
3. A teaching slide-tape presentation based on the film consisting of 80 color slides, an audiocassette, and a written script; and
4. A client instructional book based on the film containing a simple explanation about the method using the script and art work of the BOM. Entitled Love and Fertility, it is a 64-page, hard cover, glossy book.

All materials were initially developed in English by FAF and reviewed by the A.I.D. CTO in draft. All materials have been translated and published in English, French, Spanish, and, in the case of the kits, posters, and film, Portuguese and Arabic. There was no target audience pretesting prior to, or during, the development phase. Although FAF showed early versions of certain materials to a number of BOM experts in the U.S. (including the training workshop faculty, and in the case of the posters, Drs. John and Evelyn Billings), these materials have not been systematically or objectively tested for comprehension, cultural acceptability, or motivational value in the target audience. FAF explained that it has been producing these materials for many years and has only simplified existing materials, and that, in any case, people are not so different in different regions that they would require different educational materials.

The evaluation team has based its assessment of these materials primarily on the English, Spanish, and Portuguese versions.

2.2.1 Teaching Posters

The posters, like the film, are of particular importance because they become a permanent part of the training or instruction and do not run the risk of getting "used up," as is the case with the kits and books. They are generally of excellent quality and represent an important contribution toward making BOM information more widely available. They are extremely practical, as they can be used where there is no electricity for slides or films and they are lightweight for easy transport. They are generally attractive, although the layout of the typeset and the charts of mucus are somewhat dense. (Appendix F contains reduced reproductions of the posters.)

The basic mucus pattern poster and both sides of the "human fertility" poster (the fertile and infertile cycles of the land and the diagrams of the human reproductive cycle) could be used in multi-method settings as well as BOM settings.

Of all the materials produced, the posters are the most technically accurate, except that, as with the film and book, they imply that the average number of days of abstinence is less than is the case. Also, the mucus pattern and photographic depiction of the mucus do not fit those described by some participants for their populations.

One concern is that the large illustrations of the human faces and the anatomy in the posters were poorly done. In addition to the poor artistic quality, the human faces are Caucasian. A.I.D. insisted that the illustrations be improved for materials to be produced in the remaining languages. The materials produced later are more attractive; however, the faces are still Caucasian and the woman inexplicably has purple hair. Although cost was a consideration in not producing drawings that look like the various target populations, this limitation detracts from the cultural acceptability of these otherwise valuable posters.

The posters will probably have the most positive impact of all the outputs of this project in that wide distribution of the posters to instructors will ensure standardization of the rules for using BOM and will give teachers a sense of professional pride in their instructional process.

2.2.2 BOM User Kits

The evaluation team saw two variations of the BOM users kits produced under the Cooperative Agreement. The original kit consisted of a durable, lightweight, water-proof plastic chart with space for recording six menstrual cycles of up to 35 days per cycle, information on the manner of observing and charting, elementary information on fertility and a pictorial description of the cervical mucus discharge both during the normal cycle as well as during breastfeeding and other special circumstances (e.g., post-pill and post-IUD, during premenopause, and in infertile couples). The kit contains sheets of reusable stamps of durable plastic that adhere to the chart but can be removed later. Sufficient stamps to chart six cycles plus a few stamps to cover losses are included. The kit also contains reproductions of the posters. Unlike the posters, the cover page of the kit did have different, culturally realistic illustrations for different populations.

The second version of the kit includes three modifications on the above. This kit is smaller and although it is of durable material, it is neither plastic nor waterproof, and the stamps are not reusable. This second version is therefore fundamentally different in its potential cost because it is no longer a one-time only expense if the user is to continue charting with stamps. FAF explained that the original kits were too expensive. Reports from participants suggest that both the cost and some practical problems associated with the first kits (see below) were obstacles to their use. In addition, many users abandon use of a charting kit once they have learned the method.

According to participant feedback, there are significant problems with the kits. The fact that there is no possibility to reproduce the materials locally was the most universal criticism, particularly since the cost of the kits exceeds local resources. Another common complaint was that the reusable stamps fell off the chart. Other more common criticisms included the following:

- The mucus pictures in the stamps do not correspond with what the client sees and this has caused confusion.
- Some simpler form of charting would be more suitable for them, e.g., colored pencils, local plant dyes, or cloth charts.
- The chart lacks a space for the date and day.
- The charts are too large.
- Many clients have difficulty switching from the Billings charting system to one with which they are accustomed.

FAF is no longer producing either of these kits. Since the end of the Cooperative Agreement, FAF has designed and begun production of a pocket-size version of the book *Love and Fertility*, which also contains a non-plastic sheet to cover several cycles, along with non-reusable stamps.

2.2.3 Book and Slide-Tape Presentation

The production of the slide-tape and book was approved as part of the amendment to the Cooperative Agreement that supported the expansion of training-of-trainers to Africans and Asians. The amendment is less explicit on the specifications of these products than was the case for the film, kits, and posters. Both products are essentially knock-offs of the film. This has provided consistency among the materials and has also greatly reduced costs for development.

The slide-tape case contains 80 slides based on the preprint graphic materials used for the film, one 30-minute audiocassette based on the script of the film, and a written guide to accompany the slides. Because the slide-tape presentation was directly adapted from the film image and script, most of the comments about the film also apply to the assessment of the slides. In addition, the slides have particular advantages and disadvantages compared to the film. The slides can be stopped repeatedly for questions and discussion; they can be adapted for local use (an innovative family planning service provider could, for example, modify either parts of the slide or the narrative presentation); and their use is more feasible for many programs (slide projectors are less expensive and more transportable than film projectors). However, some of the film's visual symbols used to depict the process of change in a woman's cycle lose meaning in the more static slide presentation, which obviously depends on far fewer images for each concept than does an animated film.

The book, entitled *Love and Fertility*, is a hard cover, multicolor, heavy-stock version of the film and slide show. The content and graphics are the same as the film. As is the case with most of the materials, the production (manufacturing) quality of the book is excellent.

As with the slide-presentation, comments here largely reiterate those made on the film. The book does, however, have certain advantages and disadvantages as compared to either the film or the slides. For example, the book has the advantage of providing an even more extendable educational process than the slides because it can be taken home and re-read to clarify difficult concepts. On the other hand, it is more reliant on literacy than the film or slides. Although the layout and graphics are excellent and the type is attractive and large, the text is too sophisticated for many readers -- it has been analyzed and determined to be at the 10.9 grade level -- thus corresponding to concerns about the sophistication of the film. In addition, as with the slides, some of the visual symbols of change on which the film relies translate poorly to the more static medium of print. Finally, at an approximately \$10.00 purchase price in developing countries, the book is prohibitively expensive for mass use.

FAF sees the book as a free-standing product which provides readers (including those with only a few years' schooling) with everything they need to become BOM users. Because the book comes in a format that can be more easily used for self-instruction, however, the flaws in the content become a particular concern.

Relative to the comments on the posters and kits, participant feedback on the slides and book is limited. The film and slide-tape are obviously more expensive and so were produced in fewer numbers; this partially accounts for the weaker response on the slides. A number of respondents report that the slides are more practical than the film, but one mentions she has no slide projector. Fewer than 50 percent of the respondents report having received copies of the book; it is rarely mentioned when requests for more materials are made. There are relatively few comments on the book.

2.3 Summary Comments on Materials Overall

Although the preceding sections have provided individual assessments of each product developed under the project, for purposes of summary and because the materials were developed as complementary units of a package and there are several general concerns about the

entire package of materials, the following comments represent a synthesis of the evaluation team's findings, responses from the participants, feedback from other Cooperating Agencies (with a range of expertise including NFP, family planning, and materials development), site visit reports by FAF faculty, and several comments from USAID missions.

2.3.1 Cultural Appropriateness

Some general remarks about cultural appropriateness can be applied to the materials overall, which, in addition to the previous comments on each product, would need to be considered in designing audience testing on the comprehension, acceptability, and impact of the materials among different populations.

- The language used in the materials ("endometrium," "marital relations," etc.) and the degree of sophistication of the material make them inappropriate for many less-educated people.
- The approach used in the materials does not allow for local "ownership": They do not have a place for the name of the local provider, they do not emphasize the importance of obtaining instruction, and they are designed to be used only by individuals who have received training from FAF. As such, the overall approach is a centralized, top-down one which perpetuates dependence and inhibits local or grassroots innovation and adaptation.
- No back-and-forth translations of the materials were done and the quality of the translations has not been assessed (with the exception of one evaluation team member who found the Spanish translation to be excellent, and one reported criticism of the translation that had to do with the vernacular of the Arabic).
- There are a large number of images and choices of text that have been described as "confusing" or "shocking" by viewers. It is not known how these and other images and choices of language are received in different populations.

2.3.2 Field Use of the Materials

Overall, the participants are happy to have any NFP materials at all and do seem to be using the materials as long as the supply lasts. The posters are the most widely used and have received nearly unanimous acclaim by recipients; the slides and book received overall fewer and less uniform comments from questionnaire respondents; and the kits are the least consistently used and were consistently found lacking in appropriateness and/or practicality. Although many respondents request a continuous re-supply of the kits, others are not using them. There are various reasons for this lack of use: some respondents cite concerns about the appropriateness of the kits themselves, others state they prefer not to use them because they cannot be reproduced locally. Still others cite problems with cost, shipping delays, and excessive customs charges.

In quantitative terms, it is important to note that the demand on the part of instructors for materials has not been met. The majority of participants (58 of 84 the A.I.D. questionnaire respondents) state that their supplies do not meet the needs of the number of new instructors they are training. All materials were mentioned, but demand for the poster was mentioned most frequently. Also, some participants responded that they did not receive the full set of materials expected and wanted the missing elements.

Most respondents had received the film and in many cases, it seemed that they used this as information for introductory groups or before starting a training program. It was also used in seminars and conferences. Since there was only one film for each country, a few of the participants had not had the opportunity to use it as distances were too great to permit lending and receiving without great inconvenience. In a few other cases, the trainer had received the film but

had never used it as there was no film projector available. There are reports of programs producing their own videotape copies.

It should also be recalled that many NFP instructors in the developing world have suffered a serious lack of NFP teaching materials. Many of the participants had no audiovisual or print teaching tools (except for charts) prior to the FAF project. As several reviewers pointed out enthusiastic use of materials in the field by the FAF graduates, while understandable, is a limited indicator of the quality of the materials. The enthusiasm among the FAF graduates, therefore, does not constitute an objective analysis of comprehension, acceptability, or impact on the ultimate target audience (users). The disappointing number of new users of BOM would seem to indicate a discrepancy between FAF graduates' appreciation of the materials and the materials' actual appropriateness for users (see Chapter 3.3.2).

In conclusion, this project can in a sense be seen as an expensive, large-scale, but unsystematic field test for materials FAF wanted to produce. As a case in point, because the prototype kits were not field tested prior to production, A.I.D. had to spend close to half a million dollars on the production and distribution of kits that FAF has since replaced with a different product.

2.3.3 Remaining Need for Materials for Use in Multi-Method Family Planning Programs

Currently there are very few family planning programs that provide secularly oriented NFP instruction. The integration of religious doctrine into NFP instruction has been mentioned by many family planning programs as their greatest concern about NFP. The development of secular approaches to NFP are needed to allow family planning clients informed choice. The intention of this project was to provide such materials. Specifically, it was intended that the film produced under the project would provide family planning programs with secular information about NFP. However, as mentioned above, the completed film was targeted for NFP users and providers; thus, it did not fulfill this material needs gap.

Recommendations

3. In future contracts and Cooperative Agreements that involve materials development, A.I.D. should ensure systematic pretesting in the target audience by qualified experts as part of the development process.
4. In places where distribution of more BOM instruction materials is a priority, there should be independent testing, with the posters taking precedence. However, given that user data indicate a probable greater need for NFP promotion (and possibly institutional development) than for more materials, extensive retroactive field testing of all the materials produced by FAF is not indicated at this time.
5. A.I.D. should support broad-scale efforts to develop training and user materials that will allow multi-method programs to incorporate into the cafeteria of contraceptive options basic information about fertility and its application to family planning, including referral to NFP programs. The evaluation team views such efforts as a major strategic recommendation for narrowing the gap between NFP and multi-method providers. These information and training efforts should be carried out by a collaboration of population organizations (that are open to NFP) jointly with NFP organizations (or individual consultants) that are equally willing to support multi-method approaches.

-14-

3. Training Activities

3. Training Activities

FAF's training activities included conducting workshops at FAF offices in Louisiana and developing a curriculum in BOM training. The curriculum can be used to train new instructors as well as new instructor-trainers. It was used during the workshops and distributed to the participants to replicate for use in the training of new instructors. It was produced in English, Spanish, and French, and consists of ten units (modules) four of which are mainly about pedagogy and six of which contain didactic material about the BOM.

The purpose of the workshops was to train experienced BOM instructors to become trainers of new instructors. FAF conducted nine training "institutes" or workshops during the course of this project. Six workshops were held in Spanish for Latin Americans; two in English (one for Asians, one for anglophone Africans); and one in French for francophone Africans. A total of 252 participants attended the workshops, 199 of them from Latin America.

Because the evaluation team was not able to observe the training or to conduct direct site visits to participants, the assessment of the training activities (workshops and curriculum) is based on the following data:

- 1) Review of the training curriculum;
- 2) Replies from the 84 respondents to a questionnaire sent to workshop participants by A.I.D. in preparation for this evaluation (this number of respondents represents about a 30 percent response rate);
- 3) Replies forwarded from FAF to A.I.D. from 40 respondents to a questionnaire sent to workshop participants by FAF just prior to A.I.D.'s survey;
- 4) Replies from the 22 USAID missions that responded to a cable questionnaire sent to countries that had sponsored trainees; and
- 5) Reports on post-training site visits to Latin America conducted by FAF workshop faculty.

3.1 Curriculum

3.1.1 Strengths

- The curriculum includes the basic elements of a formal curriculum: Each unit commences with a list of objectives, materials needed, activities, and time required. The organization of the curriculum also clearly considers the differential learning needs inherent in adult education, and the didactic units are subdivided by color codes.
- The curriculum incorporates participant practice/feedback sessions (the "microteach" technique), so that both teaching skills and didactic information are reinforced in many of the units.
- The curriculum also includes a useful sample evaluation form for administration to trainees during and at the end of the workshop. One unit includes a good summary of scientific papers. There is also a separate evaluation form included for evaluating microteach demonstrations by participants.
- Although there are a few important areas lacking in both the pedagogical and didactic material of the curriculum, **most basic information is included and the information throughout is generally technically accurate and clearly presented.**

3.1.2 Weaknesses

The didactic aspects of the curriculum are generally technically accurate, but there are several topics that are inadequately treated:

- Pathological vaginal discharges stemming from reproductive tract infections are particularly prevalent in parts of Asia and Africa and can possibly create problems for women trying to follow their mucus pattern. This subject merits only five lines in Unit 8.
- The information on abstinence and sexuality lacks sufficient detail. Maintaining abstinence for the successful use of the BOM demands close cooperation between the couple and communication on matters of sexuality as well as fertility. There is little in the curriculum that will aid the trainer or instructor to provide users with information about sexuality, communication skills, or values clarification for living with NFP. An essay, "Psychological Aspects of Natural Birth Regulation," is included in the curriculum, but does not adequately meet this need.
- New NFP trainers and instructors have administrative challenges to face as well as pedagogic ones after their training. Issues such as program planning, supervision, evaluation, and workshop logistics are only some of the basic areas NFP instructor-trainers must master. The 90 minutes dedicated to programmatic issues is insufficient to provide most trainees with the knowledge and skills they will need to meet these administrative challenges.
- There is no explanation in the basic level presentation of how to observe the mucus.

There are also a number of less major concerns about the didactic portion of the curriculum:

- Unit 3 (NFP), which new instructors will presumably use with clients, does not include any general introduction to the method. Such an introduction (a general description of the method, advantages and disadvantages, effectiveness, the teaching system, follow-up, etc.) would allow clients to make a more informed choice about trying NFP.
- Unit 4 (Anatomy and Physiology) focuses too much on the mucus plug in the basic version. The advanced version should mention prolactin as an important pituitary hormone to be technically accurate, particularly since NFP instructors deal with breastfeeding women.
- Unit 5 (Introduction to the Method) uses a different charting system than is used in the rest of the materials. This is confusing.
- Unit 5 also states that "Internal examination is not necessary and should be avoided." This statement may lead some people to think they should avoid internal examination by a clinician, even for health reasons.
- Unit 6 (Observing and Charting) does not place sufficient emphasis on the sensation of wetness. For example, page 4 reads, "...notices a change from dryness to a feeling of wetness, checks and confirms by what she sees that her mucus flow has begun." This might better read, "She feels or sees a change in wetness, indicating that her mucus flow has begun." Only in the advanced version is sensation included in the description of mucus characteristics.
- Unit 9 (Follow-up and Training) is devoid of content. Even if this unit is pure "microteach," it should include introductory instructions, etc.
- Unit 10 (Conducting a Training Session) is a vitally important topic for the curriculum and yet is only one page long.

- The scientific portion of the curriculum (Unit 7) lacks information on two important issues: 1) The recent work on the ultrasonic study of the fertile phase of the cycle -- although the inclusion of such findings is not obligatory, they would enhance the curriculum. 2) The reliability of NFP for sex pre-selection -- FAF did not include any scientific findings in this area and has explained that they felt it was advisable to avoid the subject. However, one respondent's comment that "Couples...can also choose the sex of a child..." indicates that participants may have sustained some confusion about the reliability of NFP for sex selection.

Aside from the technical concerns, there are several other questions about the curriculum:

- As stated above, the content on teaching skills (the pedagogy units) is technically adequate. The only teaching methods utilized and taught during the workshop, however, are lecture, reading, microteach, and a film. There is little use of the varied teaching techniques normally included in a training-of-trainers (TOT) curriculum, e.g., group exercises, open discussions, games, etc. Training related to issues such as family planning and sexuality normally includes values-clarification activities. A greater variety of teaching methods would have been valuable not only for the course, but, just as important, for trainers to learn and train others in the ways people learn.

- Although the curriculum materials were supposed to be color-coded apparently at least some of the materials produced were not: the copies sent to A.I.D., which formed the basis of the evaluation team's review, were not so coded, although the team did see color-coded versions at FAF.

3.2 Training Workshops

The objective of the training workshops was to prepare qualified BOM teacher-trainers. The selection criteria developed by FAF for the participants included the following:

- To be certified as BOM teachers by an NFP organization recognized by WOOMB (World Organization/Ovulation Method/Billings);
- To be currently teaching BOM at least six hours/week;
- To have good working relations established with the national or regional BOM organization in their areas;
- To be able to travel to the U.S.;
- To be fluent in the language of the training curriculum;
- To be able to implement a training program within their locales; and
- To be known by faculty or participants in previous training courses.

The content of the training workshops reflects the strengths and weaknesses of the curriculum, as discussed above. In addition to the content, the evaluation team assessed other elements of the courses, including their organization, selection of participants, and the quality of teaching.

3.2.1 Strengths

- Most participants deemed the organizational aspects of the course to have been handled very well. This included such arrangements as visas, travel, reception, lodging, and the training facility. Feedback from the USAID missions also included favorable comments but overall was more mixed (see below for comments on the organizational aspects).

- The quality of the trainers appears to have been very good. The use of non-traditional techniques such as "microteach" was noted to be of particular value in the workshops.
- The faculty and FAF project staff carefully evaluated each workshop and made improvements for the following one. As a result, FAF staff felt that each workshop represented an improvement over the previous one.
- Participant evaluation forms, both at the time of the training, and in the follow-up surveys, have been very positive.

3.2.2 Weaknesses

- The diagnostic test given at the beginning of the training was very different from the post-test. Without a standard pre- and post-test, there is no objective measure of the increase in knowledge levels among participants. This comment applies to the curriculum as well as the workshop, but is included here because the exams are not included in the curriculum.
- One of the French faculty members did not speak French. A translator (who was acquainted with BOM and FAF but was not a native French speaker) was used to translate all of this faculty member's presentations.
- Many of the participants did not meet the most basic selection criteria: of the 84 respondents to the A.I.D. survey, only 59 (just over two-thirds) met the criterion of having been NFP instructors before the training. One site visit report to South America mentions that two Bolivian participants, at least two of the Peruvian participants, and all of the recommended Ecuadoran participants were lacking the criteria for training.
- In addition to underprepared trainees, there were at least some cases of overqualified participants. One highly experienced medical professor left after two days; he is apparently included in the group of graduates.

3.2.3 Issues/Concerns

- Most participants felt the logistics and administration of the training had been handled very well, while comments from the USAID missions on these aspects of the training were largely favorable, but more mixed. For example, in at least one country, FAF directly contacted the participants rather than first requesting concurrence from the country USAID mission. When concurrence was not deemed appropriate, the mission was in the difficult position of refusing a participant who had already been informed of his/her invitation. One mission indicated that the selection process relied too heavily on personal friendships and reported that FAF did not respond to a request for materials. Another wrote that getting visas for the FAF trainees was "a big headache". One Asian mission reported a lack of participants' English-speaking ability.
- A.I.D./Washington staff report that FAF lacked familiarity with and failed to respond to A.I.D.'s policies and priorities with regard to which countries could send participants. In the case of Brazil (in which the Brooke Amendment⁵ disallowed new A.I.D. support), FAF was so insistent that A.I.D. allow Brazilian participants that various levels of A.I.D. staff had be consulted, including the General Counsel. In the case of Mexico, FAF ignored A.I.D.'s requests to limit or reduce the number of Mexican participants in response to the Mexican government's family planning priorities and post-earthquake (1985) relief priorities. FAF was similarly insistent on trying

⁵The Brooke Amendment to the Foreign Assistance Act denies assistance to countries with a non-payment of foreign debt policy.

to bring participants from China, which does not receive A.I.D. support. FAF has stated that it was foolish to require approval of participants by USAID missions.

- The demands FAF's inexperience and uncooperativeness placed on A.I.D.'s staff required an enormous expenditure of A.I.D. staff time. During the training phases of the project, this project required the equivalent of full-time monitoring shared among A.I.D. staff. Such excessive monitoring and backstopping was done to the detriment of other project management responsibilities.

- The evaluation team was not able to observe the training directly or interview any trainees and was, therefore, unable to assess to what extent the workshop dealt with content issues beyond those addressed by the curriculum. Hence, there remain some questions about how FAF handled certain of these issues:

1. The U.S. Government is concerned that all family planning acceptors be fully informed about available family planning methods. The DeConcini "Referral" Amendment in the 1986 Continuing Resolution to Section 104(b) of the Foreign Assistance Act, which states that "funds shall be available only to voluntary family planning projects which offer, either directly or through referral to or information about access to, a broad range of family planning methods and services," is intended to ensure this informed choice. Because FAF opposes the use of contraceptives and there is a significant discrepancy between what FAF and what A.I.D. and most Cooperating Agencies define as honest and responsible information about contraception, the A.I.D. CTO, in light of the DeConcini Amendment, advised FAF not to include discussion of contraceptive methods in either materials or training. The training curriculum that FAF produced wisely and purposefully did not include any contraceptive information in order to avoid providing misinformation about contraception. During training, however, FAF faculty/staff did not refrain from speaking about contraceptives. As FAF explained, it was inevitable that questions about contraception arose; when this occurred, FAF stated that such questions were answered honestly.

The evaluation team has no details on what information was given about contraceptives but questionnaire responses indicate that at least one participant (a physician from Africa) stopped offering other contraceptives upon returning home. There are also informal comments denigrating other methods from a number of other participants in the "General Comments" section of the A.I.D. and FAF surveys, including comments about having learned more about contraceptive methods from the training (see discussion of impact below).

The specific criticism here is not that FAF faculty reported anything false or irresponsible regarding other methods, but that the faculty were apparently not instructed to follow a similar policy as was maintained for the curriculum -- that is, to refrain from comment about contraceptive methods.

2. In a related issue, one African USAID mission has reported (and objected strongly to the fact) that a country participant returned home with the film, *The Silent Scream*⁶. A participant from another African country reports back to FAF "a wonderful impact" from showing this film. An Asian participant reports translating the film into Thai. Because survey forms did not ask participants whether they received this film, it has not been determined how widely or under what circumstances this film was distributed to participants. When FAF was asked if the film was actually shown to participants, the response was that it was not, but that it would have made no difference if it had been "because the [U.S.] administration is opposed to abortion." Distribution of this film was clearly not one of the objectives of this project.

⁶This film was produced by opponents of abortion and graphically depicts the termination of pregnancy.

3.3 Application of the Curriculum and Training in the Field

As stated above, the assessment of the use of the curriculum and the training in the field is based on the reports from the participants, the reports from USAID missions, and the site visit reports by the FAF faculty. These sources, however, have limitations: 1) the participant questionnaires rely on self-reporting; 2) many of the USAID missions are poorly informed about the ongoing activities of the FAF participants; 3) the field visit reports submitted by the FAF faculty are very weak documents -- they contain almost no empirical data, present sparse findings, offer recommendations that are poorly substantiated, and are biased because the training was in essence evaluated by the trainers.⁷ Despite these limitations, however, a number of findings are clear and useful.

3.3.1 Application of the Curriculum in the Field

Reports from participants and from the site visits made to Latin America by the three key faculty from the FAF workshops indicate that the curriculum is generally used as a reference document rather than a working tool. In most countries, simpler material is being used, although one country (Chile) is using a more academically developed approach. Virtually all participants seem very glad to have the curriculum as a reference.

3.3.2 Application of the Training in the Field

Quantitative impact data on the application of the training can be quantified on three levels:

1. The number of new instructor trainers -- of the 84 participants who responded to the A.I.D. questionnaire, 37 (43.8 percent) have become NFP instructor-trainers since the FAF course. Another 29 (34 percent) were already training new instructors when they came to the course; most of these presumably improved their skills. The other 18 (21.4 percent) are not training new instructors. If the respondents are representative of the entire participant group, it can be assumed that FAF has prepared close to 105 new trainers. It may be reasonable to assume, however, that those participants who are applying the training successfully are more likely to have responded. The survey responses may therefore be overestimating the application of the training overall.

2. The number of new instructors trained -- it was projected that each participant would train 12 new instructors. Participants reported training a total of approximately 4,305 new instructors in the four years since the workshop -- 1,200 of these instructors were trained by one program in Peru. Even eliminating this extraordinary Peruvian figure, the participants still averaged 12 new instructors each.

Although one can assume some increased coverage resulting from the greater number and more systematic training of teachers, the demand for training to become an NFP instructor does not always reflect an actual need for more instructors. NFP users often become so motivated to teach what they have learned that a high proportion want to become instructors. The evaluation team has previously observed this phenomenon in a number of countries. The

⁷When FAF was asked why it sent the faculty on these evaluation visits rather than an independent observer, the reply was that it was a budgetary consideration, as these people were already going to be in Latin America. However, the reports indicate that A.I.D. paid for these site visits (including full travel costs).

growth in the number of instructors -- even well-trained instructors -- is therefore an extremely limited indicator of the client demand.

3. The number of new users -- a growth in this number is, of course, the ultimate desired impact of training trainers and instructors. It was expected that each new instructor would train 50 new users, reaching a total new user population of over 215,000. (The time period for this projected goal was not specified; however, the surveys reflect an average four-year follow-up.) The raw data self-reported by respondents (representing one-third of workshop participants) indicate a total of 17,613 new users, or less than 10 percent of the stated goal.

Although provocative, these data are of limited value because of limitations in both the A.I.D. and FAF survey instruments (e.g., some respondents refer to users taught prior to as well as since the workshop, and some respondents refer to the number of users taught personally, while others refer to numbers taught by new instructors or entire programs). Therefore, even though it appears that the increase in the NFP user population resulting from this project may be exceedingly low, no conclusive statements about the quantitative increase in that population can be made.

3.4 Qualitative Impact

Although there is no objective indicator of the increase in knowledge, most respondents to the A.I.D. questionnaire expressed tremendous appreciation for what they learned and its profound impact on their work:

"The Catholic Church of my country is very thankful for the valuable support of FAF, this was a step taken by the Supreme Being, which will help implant a reign of justice, of moral growth, and of truly Christian families in Latin America...May God illuminate the executives and leaders of USAID, so that on a level of justice and equity, they might continue supporting projects similar to that so successfully carried out by FAF."

"During our training...we have gained quite a lot and as a result we feel more confident when approaching doctors, lawyers, politicians, civic, social or spiritual leaders."

"We can mark two periods in CENPLAFAM: before and after the Mandevilles' [FAF, Louisiana] support [support]. They gave us material, knowledge, self-esteem, all things that gave us the possibility to grow as an Institution."

"I am confident to say that these institutes [workshops] provide leaders in NFP throughout the world. They should continue and be sponsored for the welfare of the world in general and in particular for Africa where contraceptive pills are being delivered widely by people who don't even know how they work..."

"My special thanks go to Mrs. Mercedes Wilson, the Director of the Americas Foundation. She is a great woman not only to man but also to God. She is doing a wonderful job in Natural Family Planning. Her name reigns in our centres."

"In spite of having taught BOM for almost eight years before our trip to the U.S., the course allowed us to deepen our knowledge, actualize concepts, and motivate and technically enhance our team. The micro-teaching was a valuable practical support."

"Our attendance in Mandeville [FAF, Louisiana] helped us [to have]...the universal teaching and training ...the proper pedagogy...the appropriate material...all the scientific verification of the method...We finally got the credit and credibility among our people that the method is worthy. We knew [came to know] some reality about Artificial methods, that in U.S., people are being informed about the side effects of these, while in Africa, they are being given like bread, without any information! Some of us even realize the danger, and stopped medical work for full time information of the people and teaching of BOM...We sincerely thank FAF for their valuable teaching materials which is still helping us fulfilling your duties of teaching people this discovery of the century: the BOM."

As these comments indicate, the increase in confidence was at least as important as the increase in knowledge gained by the participants. Many of the trainees stated that as a result of their increased knowledge and having attended the Louisiana workshop, they have greater motivation, confidence, and credibility. Numerous participants report great strides in developing positive contacts with professionals, policymakers, and the media, as well as in developing strategies for advancing the use of NFP as a direct outcome of this increased sense of confidence and credibility. The majority of these respondents report applying this increased confidence and motivation specifically in advancing NFP.

Several respondents, however, also mention other activities that they are undertaking. In some cases, these appear to include the denigration of other contraceptive methods and family planning providers, as illustrated in the following statements made by participants from Asia, Africa, and Latin America:

"Very often we are discouraged, having very dim light to lead us into the battlefield of contraceptive methods, which have quite a firm standing in our community and society, especially the pills and the condoms...It is sad when we come to think of it, no matter how much we try to convince our clients toward NFP; but when the moment of decision arrives, most of them decide on the easy way out...By the grace of God, we must win...We do home visiting winning the convenience [confidence] of the grandmother: to go around [to] the daughters so that they become our users. Thanks to you for calling us to Louisiana, giving us the basic weapon to fight our way through contraceptives to NFP and BOM."

"Bearing in mind the fact that the IPPF is an organization to foster artificial birth control has just been launched in Cameroon, and is bent on destroying the existence of any practice on natural family planning, we request for more aid to fight them too. We believe that if more effort is put in our work, the so called "IPPF" International Planned Parenthood Federation, of which our best gynecologists are the back bone shall fail with time. And with our steady efforts we shall prove their fake slogans wrong."

"My knowledge [from attending the BOM Workshop] has also been widden [widened] in many directions --- I know a lot about

marketing [marketing] and more about contraceptives and promoters of such methods."

In addition, one USAID mission comments

"No [need for further training], due to ex-participants' NFP philosophy, which is to act against organizations and activities using a multi-method strategy and/or individuals who are using modern contraceptives...Although returned participants have not commented on the content of the course, mission assumes that the quality of the trainers is excellent because they were very effective in convincing the participants that other contraceptive methods were dangerous and abortives, and thus not acceptable to the Church."

Because so many NFP teachers are already vehemently opposed to all contraception, it is not clear to what extent participants' attitudes toward other methods were influenced by the training or to what extent they already held these views but merely developed the confidence and credibility to carry out anti-family planning activities more effectively.

3.5 Overall Impact of Curriculum and Training

The long-term impact of the curriculum and training will be to professionalize, standardize, and increase the training of new BOM instructors. The public profile of the trainers in their countries will also be enhanced as they carry out promotional and policy activities with greater confidence. In most cases, this higher profile will have a positive impact on the availability of the method to a greater number of users.

However, in those countries where participants are actively attacking other contraceptive methods and the agencies that provide those methods, it is reasonable to expect that another long-term effect of the training will be to create greater polarization between NFP and multi-method providers. Such a polarizing approach would reinforce biases and stereotypes among family planning service providers of NFP providers as "biased zealots." This possibility is of particular concern because biases on both sides have produced misinformation that acts against the informed choice of the public.

The key limitations on the impact of the training were a lack of qualified participants and an apparent lack of user demand anywhere near project targets. The long-term impact of the training on NFP use, however, cannot be conclusively analyzed on the available data. The demand for instructor training in NFP is not a reliable indicator of user demand. More specific survey instruments, independent site visits, or prevalence studies would be required to yield such data.

3.6 Remaining Demand Among BOM/NFP Programs

It is not possible to answer conclusively whether the training met existing demand. On one hand, FAF had to deny participation to some individuals who expressed interest in attending the workshop. On the other hand, a number of the participants did not meet the selection criteria; for instance, only 59 of the 84 survey respondents state they were NFP instructors at the time of training. (FAF explained that in some countries, no one could be identified who met the criteria and so the best candidate available was selected.) Finally, because so many users want to become teachers, a "need" has been created for trainers of instructors. However, there is no documentation that all of these trainers are needed to satisfy an existing user

demand. Rather, there appears to be a greater need to generate user demand through more effective promotion.

4. Distribution of the Materials

4.1 Distribution to FAF Graduates and the FAF Network

In order to assess the adequacy of materials distribution, the evaluation team relied on FAF's final report, the participant feedback forms, and the direct experience of one team member who had himself received the materials. There are a number of findings with regard to distribution:

▪ When FAF's distribution obligation (as described in the Cooperative Agreement and amended to give FAF the right to distribute almost all of the materials directly to their network) is compared with FAF's final report, a large discrepancy becomes apparent:

<u>FAF's Distribution Obligation</u>		<u>Actual Distribution as per Report</u>
Film	81 copies	No mention of film distribution
Film Brochure	9,860	No mention of brochure distribution
Kits	92,040	15,000
Posters	3,130 sets	2,000 sets
Books	7,472 copies	7,500 copies
Slides	220 sets	230 sets

To compound this problem, FAF's final report states that the materials "will be distributed" (emphasis ours) in accordance with the figures listed above.

One is, therefore, left with the following questions:

1. Did FAF complete distribution prior to submitting the final report? If not, why not?
2. When did FAF complete the distribution of the materials as cited in the report?
3. Did distribution figures actually match those projected in the report?
4. What did FAF do with the enormous quantity of remaining materials that they were supposed to have distributed but that are not accounted for in the report?

There are only partial data to use in addressing these questions. With regard to film distribution, although the final report does not list film distribution sites, there is one such list in the A.I.D. Project Files under "Film/1986-87." The evaluation team, however, was unable to verify this list against participant responses.

Likewise, the general distribution data in the report could not be verified against participant responses. However, because one of the evaluation team members was also listed as a recipient of materials, the final report data were checked against what he had received for this one country (Chile). This comparison revealed the following inaccuracies in the report:

	<u>FAF report's figures of material sent to Chile</u>	<u>Actually received in Chile</u>
Books	155	0
Posters	45	8
Kits	290	800
Slide sets	44	0
Film	No mention	1

An attempt was made to analyze data received from the participants on the A.I.D. questionnaire about what materials they had received.⁸ The objective was to extrapolate from the data to get some sense of the total proportion of materials that may have gone to the entire participant group. The following rough estimates were calculated:

- Kits: Out of 84 respondents, 73 respondents stated the number of kits received. They report having received 9,125 kits.
- Posters: Of 84 respondents, 71 state they received 542 posters.
- Film: Of 84 respondents, 36 affirm having received at least one film.⁹
- Slides: Out of 84 respondents, 80 received 34 slide sets.
- Book: Of the 84 respondents, 82 cite receipt of 889 books.

Extrapolating from this group, the following figures have been derived for the entire participant group (figures from the Cooperative Agreement cited in previous table are repeated):

<u>Product</u>	<u>Estimated Total Distribution</u>	<u>Agreement Requirement</u>
Posters	2,500	3,130
Slide sets	110	220
Books	3,000	7,472
Kits	40,000	92,040
Film	Estimate not available	81
Film brochure	No data available	9,860

These estimates for total distribution are obviously very crude. Nor do they take into account materials sent to non-FAF graduates. However, there is no reason to believe that this figure is anywhere near high enough to compensate for the tremendous discrepancy between what FAF was supposed to distribute and what they have apparently distributed over four years. (Again, this discrepancy remains even in FAF's own report.)

There are other concerns about the distribution of materials:

- The A.I.D. questionnaire did not directly ask whether materials were received free or purchased since all A.I.D.-funded materials were to be distributed without charge per the

⁸The A.I.D. questionnaire had specifically asked participants what materials had been received and in what quantities. Some respondents answered with the number of each of the materials received; others only checked off which type of materials they received. Some items were left blank, but virtually every participant checked off at least some items on the list. Therefore, where they left blanks, the response has been interpreted as zero. The responses of those who only provided checks for both numerator and denominator were excluded from this analysis.

⁹One respondent reports having received 20 (of the 81) films; this may refer to videotapes. Only 23 of the 36 positive respondents state how many films they had received. For these reasons, the figure for the total number of films (45) received by the respondents is probably not a valid indicator for the overall FAF group.

Cooperative Agreement. Still, 3 of the 84 respondents mention that they purchased their materials. Their comments are as follows:

"We acquired the material the day the course ended, paying for it because it is so valuable."

"Materials like slide sets and some of the books were to be bought and so some of us including myself could not afford them."

"I bought a slide show. I never received it from FAF. [emphasis ours] The community bought the film..."

- Although program and national population size influenced distribution, the participant selection process was supposed to reflect these variations. Therefore, it is not clear why the range in the amounts of materials received should have been so great.

- Several participants also comment that they have "just" received their materials. It is not known how many of the materials were received just prior to this survey or if these shipments were related to the upcoming evaluation. (FAF had delayed sending A.I.D. the addresses of the participants for months and ultimately sent only the addresses of supervisors or key colleagues.)

- With regard to handling and shipping, the original agreement stated that distribution of materials could be coordinated with A.I.D.'s Cognizant Technical Officer (CTO) for use of the A.I.D. pouch, when appropriate. According to A.I.D. staff, this proved not to be appropriate because the size of the materials exceeded the maximum girth allowed for pouch shipment. A subsequent amendment clarified that FAF would pay postage for all materials it shipped (except A.I.D.'s portion going to Georgetown University.)

- Based on the responses of some participants and recipients of materials, there were further shipping problems: 1) recipients did not receive any communication along with the materials and there was no list of what was included or a request for confirmation of the receipt of materials; and 2) numerous participants complained of unexpected and very high customs charges.

In summary, the findings on distribution raise as many questions as they answer. FAF's final report is clearly incomplete and inadequate in its reporting of distribution, and the handling of shipping was poorly administered. Because the final report is inaccurate on distribution data and because of time restrictions during the evaluation, it could not be definitively determined whether all materials were distributed by FAF during the project period, or if the materials produced with A.I.D. funds were all distributed free of charge. Only a careful fiscal audit of FAF's books and records and/or a more specific questionnaire about the number, time period, and price of materials received would resolve this issue.

4.2 Distribution to Other NFP Organizations

The degree to which materials were made available to other natural family planning programs seems to vary among different NFP organizations. For instance, IFFLP (International Federation of Family Life Promotion, an international NFP organization supported by A.I.D.'s Cooperative Agreement with Georgetown University) reports that it acquired a number of these materials without difficulty and at no cost, "considering the complementary nature of Cooperating Agencies." IFFLP has disseminated them to programs with which they collaborate. FAF staff also displayed the materials at the 1986 IFFLP Conference. In addition, a number of the FAF

participants from Africa teach Sympto-Thermal NFP¹⁰ and as such can be considered linked to the provider network outside WOOMB (the international network of Billings Ovulation Method organizations.)

On the other hand, Georgetown University requested various materials from FAF but did not receive them. The first it saw of the materials were the sample copies that accompanied FAF's request for support from Georgetown to expand the translations and distribution. One of Georgetown's sub-recipient institutions, the Los Angeles Regional Family Planning Council (LARFPC), also requested sample materials. These were sent but LARFPC was charged for them. LARFPC, which has been developing Georgetown's NFP instructor training manual, also requested a copy of FAF's training curriculum; this was never received. Eventually, when A.I.D. arranged to have its copies sent to Georgetown, Georgetown received more materials than it could easily use. Georgetown spent a great deal of time and money surveying the field to determine who wanted these materials, and in boxing and shipping them. Also, at some point, FAF inadvertently sent its entire stock to Georgetown, some of which had to be returned to FAF.

The evaluation team attempted to assess why the availability of materials to other NFP organizations was so uneven. The only information available on this issue were some strong statements made by FAF that reflected strong opposition to making these materials available to other providers, statements that included comments to the effect that only FAF is competent to teach NFP.

The feedback from NFP organizations beyond the FAF participant pool is mixed. In general, these reports are similar to (and helped inform) the evaluation team's overall assessment of the materials (see Chapter 2). For example, one NFP leader with experience across Africa questioned the characterization of the mucus pattern; she asked whether the pattern presented perhaps describes American women. In another instance, a Peruvian program that received the materials through Georgetown organized pilot groups to test the materials: each instructor asked five new couples and five "autonomous" (continuing use) couples to try the materials. They found the materials comprehensive, attractive, and informative but not appropriate for the reality of their environment. Both instructors and users found it confusing to select the right stamp and to use the plastic stamps. For these reasons, the Peruvian program is no longer using the FAF materials. IFFLP reports observing a poor woman in Brazil using the posters with enormous pride, but also states that it has not seen the posters or kits in use in its demonstration project countries that sent participants to FAF.

Although there are no data on the numbers of materials ordered by NFP groups not related to FAF, it is assumed that most of these were distributed through Georgetown and IFFLP.

4.3 Distribution to A.I.D./Washington

The original Cooperative Agreement called for approximately 20 percent of the materials produced to go to A.I.D.; as of June 1988, A.I.D. had received only a few samples. At that time, A.I.D. advised FAF that it could sharply reduce this percentage to .5 - 5.0 percent for the various materials, and that A.I.D.'s share should be sent to Georgetown.

¹⁰The sympto-thermal method of NFP is a combination of the monitoring of basal body temperature to detect ovulation and observation of cervical mucus and other symptoms of ovulation to predict the start of the fertile period.

A.I.D. and FAF offer different explanations for how A.I.D. came to reduce the number of materials required. In 1986, FAF contacted A.I.D.'s Population Director in an effort to reduce the number of materials to be sent to A.I.D.; A.I.D. stated that it needed all of the originally required number. (Indeed, an early survey of USAID missions, which informed the missions that a BOM film was being produced for family planning providers, generated a request for 399 copies of the film.)

Thereafter, according to FAF, it repeatedly asked A.I.D. to take the materials because they were occupying storage space at FAF. FAF stated this offer was made verbally, not in writing. FAF further stated that the only reasons it did not send them to A.I.D. was because it (FAF) did not know where to send them and because FAF refused to pay for the postage (the Cooperative Agreement does not state explicitly whether A.I.D. or FAF was to pay for shipment of the materials from FAF to A.I.D.). At the same time, FAF also stated that it would have been dangerous for these materials to be used by individuals (such as staff of USAID missions and organizations like The Population Council and Family Health International) who had not gone through training on the use of the methods.

In either case, A.I.D. staff refuted FAF's claim that postal costs were the obstacle to forwarding A.I.D.'s copies of the materials. The A.I.D. files indicate repeated requests until June of 1988 for the materials with no reference to the issue of postage. A.I.D. staff believed that FAF's concern about non-NFP organizations having access to its materials was the true obstacle. FAF's own statements and its refusal to send materials to numerous Cooperating Agencies (see below) corroborate this view.

Eventually, A.I.D. received substantial criticism of the materials from Cooperating Agencies who felt that the materials were of limited value in the settings in which they work. Given that A.I.D. itself did not find the materials very useful for family planning programs, and that there was little demand from the Cooperating Agencies, and no supply forthcoming from FAF, A.I.D. agreed in a June 1988 letter to allow FAF to send most of the materials originally destined for A.I.D. to FAF's own provider network. The few materials remaining for A.I.D. were to be sent to the Georgetown NFP project. (This June 1988 letter also stated that FAF was to pay for the shipment of all materials to FAF participants, without use of the A.I.D. pouch, while A.I.D. agreed to pay for postage of materials going to Georgetown.)

Furthermore, as late as May 1989, A.I.D. still did not have a French version of the training curriculum. When an A.I.D. staff member called to request a copy, she was told that 1) another A.I.D. staff member had received one when she observed the training; and 2) FAF did not want the materials passed on to anyone who had not been trained in the method. Once A.I.D. determined that no A.I.D. staff had received the French curriculum and insisted that FAF submit a copy, FAF sent it.

4.4 Distribution to Cooperating Agencies and USAID Missions

Several USAID missions, and a number of Cooperating Agencies requested various materials from A.I.D.. However, A.I.D. was unable to respond to these requests because it had not received the materials from FAF.

According to a recent survey of USAID missions, there have been no requests for the materials from private or government multi-method family planning programs. They report "Little or no interest," "Met strong resistance from the Government of Mexico to even conducting NFP research," and "Not enough coverage was given in the FAF Louisiana training course to other family planning techniques."

Based on a survey of the Cooperating Agencies, availability here was also uneven. Eight agencies report that they were not aware of the material developed by FAF (although A.I.D. had shown the film at an annual CA meeting). Three were aware of the materials but did not request information or samples; one of these explained that colleagues in the field had found previous FAF materials to have had serious limitations. Four knew of the materials and requested them (either directly from FAF or through A.I.D.) but did not receive them. Those agencies that had unanswered requests include Georgetown, Development Associates, The Population Council, and Family Health International. Two agencies (Johns Hopkins University and the Program for International Training in Health [INTRAH]) report that they requested the materials from FAF and received these but paid for them. One (IFFLP) requested materials and received them at no cost. One agency (Population Reference Bureau) had received the materials from A.I.D. at an early stage for professional review.

Among those agencies that were familiar with FAF's materials, the response was generally unfavorable. However, one agency stated that although the materials were too costly and probably too complicated for an average user in the developing world, that the FAF materials were part of a larger package of materials made available at an NFP training of trainers session in the Philippines that had met with a favorable reception among the trainees. Another agency felt "any material to be an improvement over the usual material, unless there is obvious error."

4.5 Summary Comments on Distribution Overall

The teaching and user materials produced under this contract were made more available to NFP programs of whom FAF approved and less available to those of which it did not approve. This approval appears to have been based on how closely each organization met FAF's philosophy about family planning and NFP. As such, IFFLP had more access than Georgetown. The Cooperating Agencies and USAID missions (and A.I.D. itself) had the greatest trouble obtaining materials. Such uneven treatment of Cooperating Agencies appears to violate the spirit of procedures of conduct of Cooperating Agencies.

5. FAF Administration/Staff

5.1 Overview

It is difficult to assess the competence of the project staff for the following reasons: 1) the FAF executive director, who was not included in the project personnel budget and did not have a formal job description, played a seminal role in all activities and so the responsibilities of other staff members, including the project director, were limited and less "visible" to the evaluation team. 2) Three different individuals occupied the position of project director (one was acting director) during its four-year history. 3) None of the project staff are currently at FAF and the evaluation team was able to reach only one former staff member by telephone.

According to the first project director, A.I.D. staff, and the evaluation team's review of file documents, all policy and decision-making activities rested primarily with the FAF executive director. This notwithstanding, the job description for the project director included selection of participants, submission of a proposed participant list to A.I.D., coordinating A.I.D. concurrence, overseeing travel, accommodations, and paperwork, oversight of project expenditures and subcontracts, and staff/consultant supervision, coordination of project evaluation, preparation of programmatic reports, and liaison activities with A.I.D. In addition, the project director was required to have "experience in program administration and management; experience and education in teaching and development of curricula; graduate degree in education or a related field; knowledge about the Billings Ovulation Method and existing programs and materials."

There was disagreement between A.I.D. and the FAF executive director concerning the competence of the first two project directors. A.I.D. felt that the first project director was generally competent in a number of areas, while the FAF executive director did not. With regard to the second project director, A.I.D. questioned his technical and administrative competence for the position. Throughout this period, however, a capable administrative assistant was able to provide some administrative backstopping.

As to the choice of consultants, FAF made appropriate selections for faculty for the training course but erred in sending these same individuals to conduct the field evaluations.

5.2 Administration/Staff Strengths

- FAF undertook and completed an enormous amount of work in a short time, and most aspects of its operation appear to have been well organized.
- Progress reports were on time and clearly written, although lacking in depth and analysis.
- According to the A.I.D. CTO, fiscal reporting was excellent, on time and clear; and the completion of A.I.D. forms was done well.
- The FAF executive director had much experience teaching NFP and in developing materials for teachers and users.
- The FAF executive director had also developed an international network (based on international conferences on the family) from which to draw participants.
- The FAF executive director had experience organizing international conferences.
- According to reports from USAID missions, travel, accommodations, and A.I.D. paperwork was generally handled competently. (There were some exceptions -- see below.)

5.3 Administration/Staff Weaknesses

- Although FAF had organized large international conferences, none of the staff had ever organized international training that required communication with and concurrence from USAID missions. (Indeed, the FAF executive director informed the evaluation team that if she had a clear idea of the amount of work required by the project, she never would have undertaken it.) According to the A.I.D. project CTO and another A.I.D. staff member, this lack of experience necessitated an enormous amount of backstopping and A.I.D. staff time -- close to two days a week for each of them during the phases of the project that included the training. In addition, there were at least two countries in which the participants were inappropriately notified by FAF that they were being invited to the workshop prior to receiving mission concurrence. Where such concurrence was not deemed appropriate, this created difficulty.

- The FAF executive director either did not understand or did not recognize the obligation to abide by existing U.S. government restrictions on which countries were excluded from receiving new A.I.D. support. The FAF executive director insisted that these restrictions be waived for the project so participants from Brazil and China could be included. This insistence required repeated explanations regarding the Foreign Assistance Act, intervention, and response at various levels of A.I.D., including the General Counsel's office.

- None of the project staff had expertise in film production, although the FAF executive director did have expertise in slide production.

- The communication and record keeping associated with the distribution of materials was weak.

- Not all staff and workshop faculty had experience in adult training. In A.I.D.'s view, this required a training course in curriculum development and adult learning methods that was attended by the project staff, faculty, and participants in the first workshop for Latin America.

- FAF did not have expertise in formal materials testing among target audiences.

6. Cooperating Agency Relationship with A.I.D.

Based on interviews with persons from FAF and A.I.D. and a review of the project files, the history of this project clearly indicates that there were serious problems at the administrative level from the beginning of the Cooperative Agreement.

6.1 Lack of Cooperation on the Part of FAF

Because the products to be produced under this Cooperative Agreement had yet to be developed, they were not specified in the Cooperative Agreement in as great detail as already existing products would be. In addition, all of the money provided to the recipient in this agreement was to be provided on a to-be-drawn-down-as-spent basis. This situation, combined with the terms of the Cooperative Agreement under which A.I.D. had "substantial involvement"¹¹ in the project, made it imperative that a cooperative relationship between A.I.D. and FAF be maintained. (Substantial involvement in this case meant that the CTO had to review and approve each phase of the project before the next phase could begin.) In a scenario such as this, if cooperative solutions to disagreements cannot be worked out, a CTO faces the choice of continuing to insist on changes that might not be forthcoming, thereby setting the project behind schedule and possibly bringing it to a standstill (or being overruled), or giving approval of a less than satisfactory product.

Little evidence was found of what can be construed as a cooperative relationship between A.I.D. and FAF. Rather, an analysis of notes from meetings and phone calls as well as interviews with FAF staff reveal a relationship characterized by conflict, due primarily to FAF's intransigence. The A.I.D. records of project progress begin by characterizing the problems with the project as mild to moderate and gradually characterize the problems as moderate to severe, and many reports also state that "the project continues to take a disproportionate amount of staff time."

6.2 A.I.D.'s Review and Approval Process

Given the limitations of the materials produced and the mixed reviews they have received (including A.I.D.'s own dissatisfaction with them), the entire process of review and approval for this project must be called into question. For instance: Did A.I.D. attempt to improve the materials? Did A.I.D. provide thoughtful input? Did A.I.D. provide technical support? Did A.I.D. assume the materials would be pretested or did A.I.D. ever raise this issue? Why did A.I.D. ultimately approve the production of materials that were not satisfactory?

In studying A.I.D.'s process of review and approval of activities being carried out under this project, the evaluation team encountered voluminous files documenting the review of materials, including many lengthy documents consisting of specific recommendations for changing the materials. A.I.D. formed a group of reviewers outside the office to provide input on the materials. In the case of the training, A.I.D. included a TOT course for the FAF trainers to develop their adult education teaching skills. A.I.D. also reviewed the curriculum in detail and made numerous changes. In the case of the film, A.I.D. provided numerous technical corrections and went so far as to hire a consultant with expertise in films for developing country audiences; this level of support is very unusual. The files also contain reports of promised changes in the materials that were never implemented.

¹¹See Appendix E for the Substantial Involvement Understandings clause, which was included as Article III in this project's Cooperative Agreement.

FAF's failure to pretest materials has been repeatedly raised by reviewers. A.I.D. staff stated that they assumed that any professional materials development project would involve pretesting. This was not, however, made explicit in the Cooperative Agreement. The issue of pretesting first appears in the files in July 1985 in a meeting with FAF; FAF denied there was any need to test the materials. (FAF has continued to deny there is such a need, despite the fact that it has changed the materials several times in accordance with critical feedback from the field.)

6.3 Summary Comments on the Cooperating Agency Relationship with A.I.D.

Obviously, for a Cooperative Agreement to work, it requires a cooperating agency. The above analysis of the stormy and intense review process associated with this project indicates a lack of cooperation on FAF's part and a failure by FAF to respect both the letter and the spirit of the Cooperative Agreement.

At the same time, although A.I.D. did engage in an extensive review of the materials and subsequently made exhaustive efforts to assure that the materials would be more responsible, accurate, and appropriate, it may also be seen to be responsible for the eventual outcome in two ways: 1) When the review and recommendation process failed to bring about an acceptable resolution, perhaps the CTO should have continued insisting on changes or should even have brought the project to a halt. Of course, there were clearly human limitations on how much time and energy could have continued to be spent insisting on changes. There may have also been political pressures within A.I.D. that precluded bringing the FAF project to a halt for technical reasons. 2) A.I.D. did not establish a sufficiently definitive expectation on pretesting in the Cooperative Agreement.

Although these measures might have allowed A.I.D. the control it needed to avoid or resolve disputes, it is possible that neither withholding approvals nor obtaining professional pretesting were realistic alternatives. Nor would these measures have substituted for a cooperative spirit and flexibility on the part of FAF.

Finally, the failure to establish a cooperative relationship was summed up in separate statements made to the evaluation team by the FAF executive director and the project CTO. When asked about A.I.D.'s efforts to improve the materials, the FAF executive director stated that A.I.D. spent little time on the project, only caused delays, and essentially did nothing for FAF. The FAF executive director further stated that FAF made no concessions to A.I.D.'s point of view, although in fact this is not true. When the project CTO was asked why A.I.D. approved materials that were found unsatisfactory, she stated that A.I.D. relented on particular points because FAF was so uncooperative, required so much time, and it was clear that FAF would persist in doing what it wanted.

Recommendation

6. A.I.D. should fund only those agencies that can demonstrate a willingness and ability to cooperate with A.I.D. and other Cooperating Agencies. Even with a Cooperative Agreement, A.I.D. should take whatever steps are necessary to ensure that at least the minimum criteria are present for the successful accomplishment of its objectives, and be in a position to withhold funding until it is satisfied that this is present. A.I.D. should be willing to withhold the approval required for progress to further stages of a project if it is not satisfied that the implementation is according to the Cooperative Agreement.

7. The Approval Process for the Project

Two issues surrounding the approval process for this project remain to be addressed.

First, given the outcome of the project it is worth questioning how an agency which was both openly opposed to virtually all of A.I.D.'s policies and activities and lacking in the technical competence and experience necessary to carry out a training and materials development project of this nature won approval for its funding request. A review of the files revealed that FAF had submitted numerous unsolicited proposals to A.I.D., all of which were turned down for technical reasons. According to A.I.D. staff involved in the project, a few members of the U.S. Congress strongly urged the A.I.D. administrator to support FAF both at the time of the project's initial funding and later when FAF requested a continuation and expansion of the Cooperative Agreement. This may help explain A.I.D.'s eventual decision to support FAF.

Second, an additional concern is whether A.I.D., in supporting this project, may have violated the establishment clause of the First Amendment to the U.S. Constitution, which precludes the use of tax revenues for activities other than those which are purely secular. The integration of religious doctrine into the promotion and teaching of NFP has been widely discussed and, in Lemon v. Kurtzman, it was determined that constitutionality under the establishment clause depends on a statute having a secular legislative purpose, on its principal or primary effect neither advancing nor inhibiting religion, and upon not fostering excessive entanglement with religion.¹² The A.I.D. review process eliminated references in the materials and training produced by this project that it felt reflected religious doctrine. The concern remains, however, that because NFP is fostered by the Roman Catholic Church, and many of the training participants report they were nominated directly by Roman Catholic institutions or clerics and, as stated earlier, the trainers (mostly Roman Catholic clerics) might not have restricted their comments to the information in the curriculum, the project might have had the net effect of advancing religious doctrine and fostering excessive entanglement with religion.

¹²Source: Benshoof, Janet. "The Establishment Clause and Government-Funded Natural Family Planning Programs: Is the Constitution Dancing to a New Rhythm?" *New York University Journal of International Law and Politics: The Civil Liberties and Human Rights Implications of the United States International Population Policy*, Vol. 20, No. 1, Fall 1987.

Appendix A
Scope of Work

Appendix A

Scope of Work

Scope of Work for Evaluation of Cooperative Agreement, Family of the Americas Foundation, Inc., DPE-3029-A-00-4023-00

I. Background

The purpose of the Natural Family Planning Education and Training Project implemented through the Cooperative Agreement between the Agency for International Development (A.I.D.) and the Family of the Americas Foundation, Inc. (FAF) was:

To carry out a program directed towards making information on natural family planning (NFP) more widely available, primarily in developing countries, in order to expand the choices available to couples who wish to plan their families, as set forth in the Recipient's technical proposal dated November 8, 1983, entitled, "Natural Family Planning Billings Ovulation Method."

The Cooperative Agreement stipulates that FAF implement an information and training program directed toward:

1. the production and distribution of a film on the Billings Ovulation Method (BOM) for family planning service providers worldwide;
2. the production and distribution of educational materials to be used in teaching and practicing the BOM worldwide;
3. developing and conducting a U.S.-based training course for teacher trainers from Latin America, Africa (including Egypt), Asia and the South Pacific.

The following outputs were anticipated as a result of the implementation of the Agreement:

1. FAF was to produce a 16 mm sound/color motion picture of 26-30 minutes duration in the English language, with suitable technical provision for full length film versions having narration and dialogue in the English, French, Spanish, Portuguese and Arabic languages. A master print of the film, plus all original footage and reprint materials, are to be the exclusive property of A.I.D.

2. A total of 122 release prints in various languages were to be produced: 58 English (38 for the recipient); 29 in Spanish (21 for the recipient); 15 in French (8 for the recipient); 10 in Portuguese (7 for the recipient); and 10 in Cairo "radio" vernacular Arabic (7 for the recipient).

3. 10,000 copies of a 2-4 page leaflet about the film were to be printed. The leaflet was to be completed and printed in the same languages and proportions as prints of the film.

4. A durable, light-weight, waterproof plastic chart which incorporates modifications and simplifications of the current charting procedure for the BOM for use by practitioners of the method was to be developed and produced.

5. The first 80,000 kits were to be produced in five languages: English (32,000 copies), Spanish (28,000 copies), French (8,000 copies), Arabic (5,600 copies), and Portuguese (5,600 copies). Each kit consists of one plastic chart and one set of sheets of stamps to use on the charts. An additional 15,000 kits were produced (in English, Spanish, French), with a smaller chart than the initial kits.

6. A set of three teaching posters which summarize the rules of the method in pictorial and written form and which depict reproductive anatomy was to be developed.

7. A total of 3,200 sets (200 for A.I.D. use) of the three posters were to be printed in the same languages and proportions as the BOM kits.

8. 7,500 copies of a book with a simplified explanation of the method taken from the film script (some of which contain a smaller version of the kits, produced in 15,000 copies), in English, Spanish, and French. Quantity for A.I.D. use unspecified.

9. 230 sets of teaching slides (containing 80 slides per set) with audiocassette and written narrative. Quantity for A.I.D. use unspecified.

10. Nine training courses of 8 to 10 days duration each for BOM trainers of teachers were to be conducted with an average of 25-30 participants in each course.

170

An estimated 230-245 trainers of BOM teachers (i.e., teacher-trainers) were to have been trained and updated in these nine courses: 150-165 from Latin America and the Caribbean; 50 from Africa; and 30 from Asia. All training was scheduled for the United States.

11. The recipient was to develop a complete prototype curriculum for the training courses to be conducted including Spanish and French translations.

FAF submitted a technical proposal dated November 8, 1983, entitled, "Natural Family Planning Billings Ovulation Method." This proposal, as modified by S&T/POP technical staff, was approved as the project paper in February 1984, with a project assistance completion date (PACD) of September 30, 1986. Subsequently the PACD was extended to December 31, 1988. The project was authorized in 1984 for one year at a funding level of \$1,100,000. Three funded extensions were approved.

- o An additional \$12,000 was added to cover administrative costs associated with the longer time frame for completion of the film.

- o An additional \$845,000 was added to provide training courses and associated materials for trainers from Africa and Asia. (The Recipient's proposal entitled, "Billings Ovulation Method Teacher Training Project for Africa, Asia and Latin America, Workplan and Budget," submitted by letter dated July 3, 1985, "as revised" was approved as an amendment to the original proposal cum project paper.)

- o An additional \$127,000 was provided to cover approved cost overrun expenses and extended to May 1, 1988, to allow sufficient time for FAF to distribute the materials produced under the terms of the Agreement.

In summary, the Cooperative Agreement began on June 25, 1984 and ended on May 1, 1988 with total funding of \$1,984,000.

39

II. General Plan for the FAF Cooperative Agreement Final Evaluation

The final evaluation of the Cooperative Agreement between FAF and A.I.D. will assess both the information, education and communication (IEC) and the training components of the Agreement. Two consultants will be needed to conduct this evaluation. They must have complementary skills in training, IEC and evaluation. One of the consultants will be designated as team leader. In addition to his/her technical evaluation role, this person will have responsibility for (1) organizing and coordinating the work of the evaluation and (2) coordinating preparation of the final report. The team leader is needed for three weeks; the other consultant is required for two - three weeks.

Both consultants should have skills and experience in analysis, evaluation and writing. One consultant who has a strong background (breadth and depth) in family planning information and communication is needed. The other consultant should have knowledge and experience specific to natural family planning, particularly training. If possible, one consultant should be fluent in Spanish or French. If not, the team may use translators to evaluate the translations of materials.

Assessments will be solicited from USAIDs in those countries which have had experience with various project activities. Participant follow-up assessments will be conducted by mail. The team will prepare and submit a comprehensive report which summarizes their findings, conclusions and recommendations at the end of the evaluation period.

It is anticipated that this evaluation will require no more than five to six person weeks of effort (2 persons for two to three weeks each). The evaluation is planned to begin in July 1988 or as soon as an evaluation team can be selected and agreed to by both A.I.D. and FAF.

III. Purpose and Scope of the Evaluation

The purpose of this external end of project evaluation is:

(1) to assess FAF's progress toward delivering outputs and achieving objectives stated in the Cooperative Agreement;

(2) to document lessons learned from implementation of this Cooperative Agreement about information, education and communication (IEC) and training with respect to natural family planning (NFP), specifically the Billings Ovulation Method (BOM) of NFP.

40

The team's assessment and recommendations will contribute to decisions about implementation of NFP-related IEC and training activities in NFP-specific projects and in other Office of Population projects.

The questions to be addressed in the external evaluation are organized under three broad headings. They are:

A. Implementation

1. Did FAF distribute deliverables and adhere to the workplan as outlined in the Cooperative Agreement and its amendments?

2. What is the team's assessment of the technical accuracy and cultural appropriateness of the information provided in the products of the Cooperative Agreement (i.e., curriculum, film/pamphlet, kits, posters, slides, book)?

3. Was the FAF training program design appropriate for the various geographic regions from which the trainees were drawn?

4. Was the FAF staff adequate and appropriate to administer and oversee all aspects of the Agreement?

5. Did FAF provide, through FAF staff, consultants or subagreements, a sufficient body of expertise in such areas as graphic design and printing, film production, curriculum development and training?

B. Lessons Learned

1. For FAF Trainees -

How useful were the materials produced by FAF under this agreement and the training provided to the trainees at FAF? To what extent are the products still being used by the trainees?

Have the FAF trainees trained other trainers, teachers and BOM users? If so, how many of each?

2. NFP Programs -

Were the materials or training curriculum available to and used by other NFP training or service delivery programs? If they were not, why? If they were, is there any feedback available on their acceptability, usefulness, and any other aspects?

3. Other Family Planning Training/IEC and Service Programs -

Were the FAF materials available to other family planning training, IEC, and service activities in developing countries? If no, why? If yes, to what extent were they, or could they be used?

C. Sustainability

1. To what extent are the effects of the project likely to continue after A.I.D. funding has stopped?

2. Did the training and IEC materials meet existing demand?

3. Did they generate new interest in the BOM?

IV. Evaluation Procedure and Proposed Chronology

A. Procedure:

1. The evaluation will include interviews with relevant A.I.D. Office of Population staff, HPN staff from the Africa, LAC and AME regional bureaus, and other Agency staff.

2. Assessments of the work performed and materials produced under the terms of this Cooperative Agreement will be solicited from A.I.D. field missions by cable. These assessments will be made available to the evaluators. In addition, comments will be solicited by the evaluators by telephone from 6-8 Missions which have had the most experience with FAF trainees.

42

3. The evaluation team will visit FAF at its headquarters in Mandeville, Louisiana to assess training facilities and review documents and materials pertinent to this Agreement. The evaluation team will also discuss project implementation with FAF to obtain their views on strengths and weaknesses of the project and on "lessons learned."

4. The evaluators will review findings from the on-site follow-up assessments of the trainees which were conducted by FAF consultants in the Latin America/Caribbean (LAC) region.

5. A questionnaire developed by ST/POP/IT and POPTECH will be mailed to all trainees to ascertain the impact of their follow on activities, including the number of teacher trainers trained, teachers trained, and users taught. It will also explore the use of the materials produced through this project. For example, were the materials used alone, or did they supplement existing materials?

6. A questionnaire will be sent to other NFP and multi-method training, IEC and family planning cooperating agencies to ascertain the use of the FAF materials.

7. The evaluators will have access in A.I.D./W and at the FAF's headquarters to program documents, project records, reports, and evaluations in order to address the specific evaluation questions.

8. The team will meet with selected A.I.D. staff to present preliminary findings and "lessons learned."

B. Proposed Chronology

<u>Date</u>	<u>Events</u>	<u>Consultant Days</u>
6/88	Finalize Scope of Work	
6/88	Recruitment/Selection of Consultants	
6/88	Development and transmission of questionnaire to trainees and other CAs; development and transmission of cable to field	POPTECH

7/88	A.I.D./W: Consultants briefed by S&T/POP staff and Regional Bureau staff	2
7-8/88	Review of documents, materials, etc. Analyze responses from trainee & CA questionnaires. Secure new or supplementary information.	10
8/88	Meet with FAF staff at headquarters in Mandeville, Louisiana	6
	Consolidate findings, conclusions and recommendations	3
9/88	Draft report prepared. POPTECH edits report.	3
10/88	Debriefing	2
10/88	Final draft reviewed by A.I.D., FAF, and team members.	2
11/88	Printing and distribution.	

2. Information Sources

The sources of information for the team will include:

--briefing by POPTECH, the contractor responsible for evaluations;

--review of proposals submitted by FAF for this project; the Cooperative Agreement, with amendments, between A.I.D. and FAF; and of correspondence between FAF and A.I.D. on this project.

--meeting with Information and Training Division Chief, Cognizant Technical Officers for the Agreement, and Office of Population technical staff who contributed to various sections of the Cooperative Agreement;

--meeting with the Director, Deputy Director and Associate Director of the Office of Population;

- 44 -

--meeting with representatives of each regional bureau
EPN office;

--briefing on the implementation of the Cooperative
Agreement by FAF staff;

--meeting with the Executive Director and Assistant
Executive Director of FAF, and other project staff;

--review of project documents, records, reports, and
trainee follow-up evaluations in both A.I.D./W and at
FAF's Mandeville, Louisiana office in order to answer
the specific evaluation questions;

--review of assessments of the Cooperative Agreement
submitted by cable from A.I.D. field missions.

--review of responses to follow up
questionnaires/cables by trainees, A.I.D. field
Missions, and CAs.

45

Appendix B

List of Persons Contacted

Appendix B

List of Persons Contacted

Dr. Duff Gillespie, Director, S&T/POP

Ms. Marilyn Schmidt, former FAF project CTO, USAID/Cairo

Ms. Charlotte Ureksoy, S&T/POP/Information and Training

Mr. Jeff Spieler, S&T/POP/Research (NFP Expert)

Mrs. Mercedes Wilson, Executive Director, FAF

Mrs. Delaine Johnson, Administrative Director, FAF

Mr. Clay Vollan, S&T/POP/Information and Training (Media Expert)

Mr. Michael Castleman, independent film producer

Dr. Charles Gifford, former Project Director, FAF

Dr. Guillermo Tagliabue, President, Asociacion de Trabajo Laico Familiar, Lima, Peru

Appendix C

List of Documents Consulted

Appendix C

List of Documents Consulted

- A. Documents in Briefing Book Prepared for the Evaluation Team:
1. Scope of Work for the External Evaluation
 2. CVs of Team Members
Anna Flynn
Patricio Mena
Deborah Rogow
 3. Cooperative Agreement
 4. Amendments to Cooperative Agreement
 5. Final Reports (transmitted by FAF letter dated June 24, 1987)
(includes information on numbers trained/by country)
 6. Telegram to USAID Field Missions concerning the evaluation
 - 6.1. Outgoing telegram(s)
 - 6.2. POPTECH compilation of responses
 7. Participant Questionnaire
 - 7.1. Correspondence with FAF regarding questionnaire
 - 7.2. List of participants
 - 7.3. Questionnaire
English
Spanish
French
 - 7.4. POPTECH compilation of responses
 8. Letter to S&T/POP Cooperating Agencies
 - 8.1. Letter to S&T/POP Cooperating Agencies
 - 8.2. Responses from Cooperating Agencies
 9. Reports of FAF On-site Evaluations of Training Participants
 - 9.1 Rev. Dr. Wm. Gibbons, M.D., to Brazil, Chile, Paraguay, Uruguay, June 3-24, 1985
 - 9.2 Fr. St. Marie to Honduras, El Salvador, Costa Rica, Panama, June 30-July 19, 1985
 - 9.3 Sr. Francesca Kears to Peru, Bolivia, Ecuador, Columbia, September 6-23, 1985
 - 9.4 Fr. Denis St. Marie to Mexico, October 5-12, 1985

Appendices: FAF Materials (one set available for review by the team)

1. Film (video) and leaflet
 2. Training Manual for BOM
 3. Client Kit/Charts
 4. Slides (based on film)
 5. Book (Love and Fertility)
- B. A.I.D. Project Files
- C. FAF Project Files
- D. A.I.D. Participant Questionnaires
- E. FAF Participant Questionnaires
- F. PATH Memorandum on Pretesting of Films
- G. Feedback Notes from A.I.D. Cooperating Agencies on FAF Film

Appendix D

Sites Visited

Appendix D

Sites Visited

A.I.D./S&T/POP Offices, Rosslyn, Virginia

FAF, Mandeville, Louisiana

Other work sites included the following:

Philadelphia, Pennsylvania (Holiday Inn)
Rosslyn, Virginia (POPTECH Office)

Appendix E

Substantial Involvement Understandings Clause

Appendix E

Substantial Involvement Understandings Clause

C. Total Estimated Cost

The total estimated cost of this agreement is \$1,100,000. Costs are subject to Standard Provision No. 1 entitled, "Allowable Costs and Contributions," and No. 6 entitled, "Revision of Financial Plans."

Article III - Substantial Involvement Understandings

It is anticipated that performance of the workscope requires substantial involvement by AID. Specific areas of involvement include, but are not limited to, the following:

- A. Review and approval of subagreements to be executed with developed and developing country organizations. This process will include review of subproject objectives to assure conformance with overall Cooperative Agreement objectives, and possible revisions to work statements and/or implementation plans;
- B. Site visits for AID technical participation in reviews of program progress and future strategy;
- C. Approval of short-term technical assistance;
- D. Approval of international travel;
- E. AID evaluations of Recipient performance, as specified in Article IV;
- F. Consultations with, and approval of, AID Cognizant Technical Office (CTO), as appropriate, on technical and administrative procedures; and,

- G. AID CTO review required prior to publications of articles about the program.

Article IV - Reports and Evaluation

A. Reports

The Recipient shall submit reports as follows:

1. A mid-term and a final report which shall recapitulate major activities undertaken during the report period. The semi-annual report shall include a prospective of upcoming activities in relation to the implementation plan; both the semi-annual and the final report may include any other matter to be determined in collaboration with AID CTO. The mid-term report shall be submitted in eight (8) copies to the CTO at the end of six months of work on the Agreement. The final report shall be submitted to the CTO within one month after completion of work detailed in the program description. Both reports shall include a critical analysis of the progress being made in achieving the aims of the program and shall indicate in what ways the original plan was followed or should be modified. One copy of all reports shall be submitted to the Agreement Officer.
2. All financial reports and vouchers for payment and reporting of expenditures will conform to standard AID regulations and procedures. (See Standard Provision No. 7A.).

55

Appendix F

Reduced Reproductions of Teaching Posters

GUIDELINES FOR ACHIEVING PREGNANCY

BILLINGS OVULATION METHOD

ACHIEVING PREGNANCY

Guidelines for Achieving Pregnancy

Conception is possible on any day after the menses begin. Conception is most probable on:

- Day 14 of the cycle, which is accompanied by a soft, rubbery cervical mucus.

Note:

- If menstruation does not occur 18 to 16 days after the Peak pregnancy has passed, then it is necessary to repeat the cycle as soon as possible after the next period begins.

Conception

Conception is most likely to occur on the day of ovulation. The remaining follicles mature and produce the sperm and egg which combine to form the egg.

The two types of cervical mucus appear during the menstrual cycle. Type 1, which is thin and watery, appears 10 to 14 days before ovulation. Type 2, which is thick and sticky, appears 14 to 16 days before ovulation. Type 3, which is thick and sticky, appears 16 to 18 days before ovulation. Type 4, which is thick and sticky, appears 18 to 20 days before ovulation. Type 5, which is thick and sticky, appears 20 to 22 days before ovulation. Type 6, which is thick and sticky, appears 22 to 24 days before ovulation. Type 7, which is thick and sticky, appears 24 to 26 days before ovulation. Type 8, which is thick and sticky, appears 26 to 28 days before ovulation.

DIFFICULTIES IN ACHIEVING PREGNANCY

When there are short durations of menses with fertile characteristics (Type 1 and 2)

Some women find it difficult to conceive because they have very short durations of menses with fertile characteristics and it is necessary to repeat the cycle as soon as possible after the next period begins.

When small amounts of mucus are produced

Some women find it difficult to conceive because they produce small amounts of mucus and it is necessary to repeat the cycle as soon as possible after the next period begins.

Appendix F
Reduced Reproductions of
Teaching Posters

GUIDELINES FOR POSTPONING PREGNANCY

BILLINGS OVULATION METHOD

The Early Days of the Cycle - The Preparatory Phase

The early days of the cycle extend from the beginning of the menstruation phase until the day of ovulation. It is a period of time when the body is preparing for the coming of the egg. The menstrual phase is the time when the body is shedding the lining of the uterus. The preparatory phase is the time when the body is building up the lining of the uterus. The menstrual phase is the time when the body is shedding the lining of the uterus. The preparatory phase is the time when the body is building up the lining of the uterus.

The early days of the cycle are the most important days for postponing pregnancy. These are the days when the body is preparing for the coming of the egg. The menstrual phase is the time when the body is shedding the lining of the uterus. The preparatory phase is the time when the body is building up the lining of the uterus.

The menstrual phase is the time when the body is shedding the lining of the uterus. The preparatory phase is the time when the body is building up the lining of the uterus.

The Early Day Rules

- 1. Avoid intercourse on the days of menstruation.
- 2. Avoid intercourse on the days of the preparatory phase.
- 3. Avoid intercourse on the days of ovulation.
- 4. Avoid intercourse on the days of the post-ovulation phase.

The Last Days of the Cycle - The Post-Post Phase

The last days of the cycle extend from the day of ovulation until the day of menstruation. It is a period of time when the body is recovering from the effects of ovulation. The menstrual phase is the time when the body is shedding the lining of the uterus. The post-ovulation phase is the time when the body is building up the lining of the uterus.

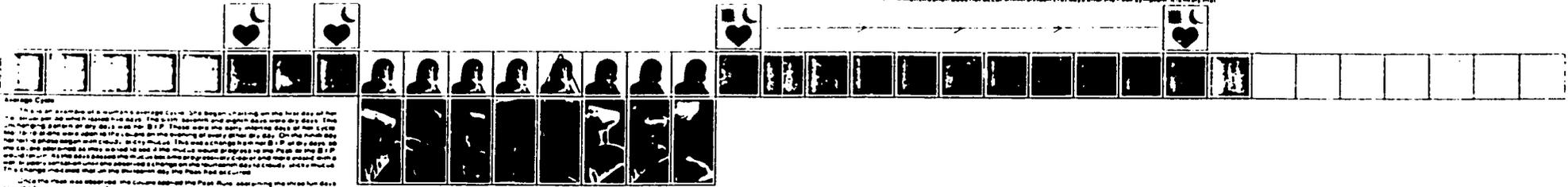
The Post-Post Rules

- 1. Avoid intercourse on the days of ovulation.
- 2. Avoid intercourse on the days of the post-ovulation phase.
- 3. Avoid intercourse on the days of menstruation.

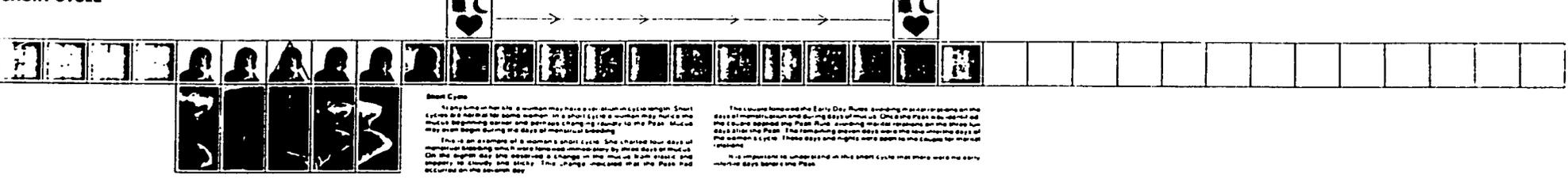
The menstrual phase is the time when the body is shedding the lining of the uterus. The preparatory phase is the time when the body is building up the lining of the uterus.

- 1. Avoid intercourse on the days of menstruation.
- 2. Avoid intercourse on the days of the preparatory phase.
- 3. Avoid intercourse on the days of ovulation.
- 4. Avoid intercourse on the days of the post-ovulation phase.

AVERAGE CYCLE



SHORT CYCLE



LONG CYCLE



ANOVULATORY CYCLE



GUIDELINES FOR POSTPONING PREGNANCY WHILE BREASTFEEDING

Women who are fully breastfeeding their babies may not ovulate or menstruate for several months. Fully breastfeeding means that the baby is exclusively breastfed for the first six months of life.

Lactation suppresses the production of a hormone (prolactin) that suppresses ovulation. This means the woman's ability to fertilize, but only temporarily, is delayed and not the result of a lack of ovulation. Ovulation begins the first day after the baby is weaned. Once the baby is weaned, the woman's ovulation resumes and she may become pregnant again. The baby is weaned when the mother begins to feed the baby with anything other than breast milk.

It is important when a woman can start to wean the baby to start weaning at the beginning of the cycle. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

At the end of the breastfeeding cycle, the woman's body begins to produce the hormone prolactin. This hormone is responsible for the production of breast milk. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

The Early Day Rule
A woman begins a new cycle when blood loss has started. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

Several weeks after the beginning of the cycle, the woman's body begins to produce the hormone prolactin. This hormone is responsible for the production of breast milk. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

The Last Day of the Cycle - The Post Peak Phase
The woman's body begins to produce the hormone prolactin. This hormone is responsible for the production of breast milk. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

Several weeks after the beginning of the cycle, the woman's body begins to produce the hormone prolactin. This hormone is responsible for the production of breast milk. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

The Peak Rule
A woman begins a new cycle when blood loss has started. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

Second Consideration
A woman begins a new cycle when blood loss has started. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

BILLINGS OVULATION METHOD

Several weeks after the beginning of the cycle, the woman's body begins to produce the hormone prolactin. This hormone is responsible for the production of breast milk. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

Billings Ovulation Method
A woman begins a new cycle when blood loss has started. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

BASIC INFERTILE PATTERN OF DRYNESS



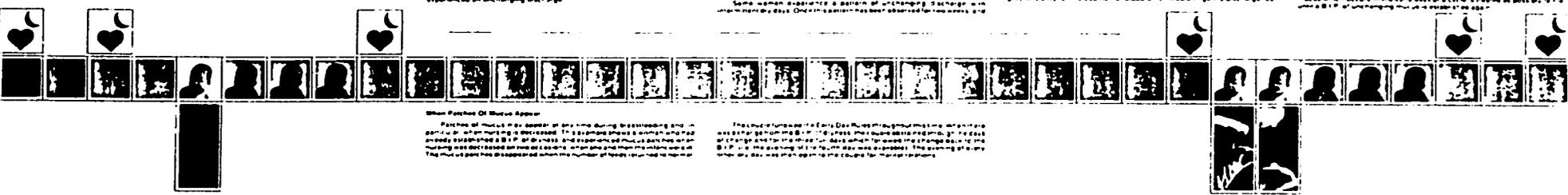
When There is a Basic Infertile Pattern of Dryness
The woman shows a pattern of dryness when she fully breastfed her baby and had a BIP of dryness. This means the woman's body is not producing enough breast milk to suppress ovulation. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

BASIC INFERTILE PATTERN OF MUCUS



When There is a Basic Infertile Pattern of Mucus
The woman shows a pattern of mucus when she fully breastfed her baby and had a BIP of mucus. This means the woman's body is not producing enough breast milk to suppress ovulation. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

WHEN MUCUS PATCHES APPEAR



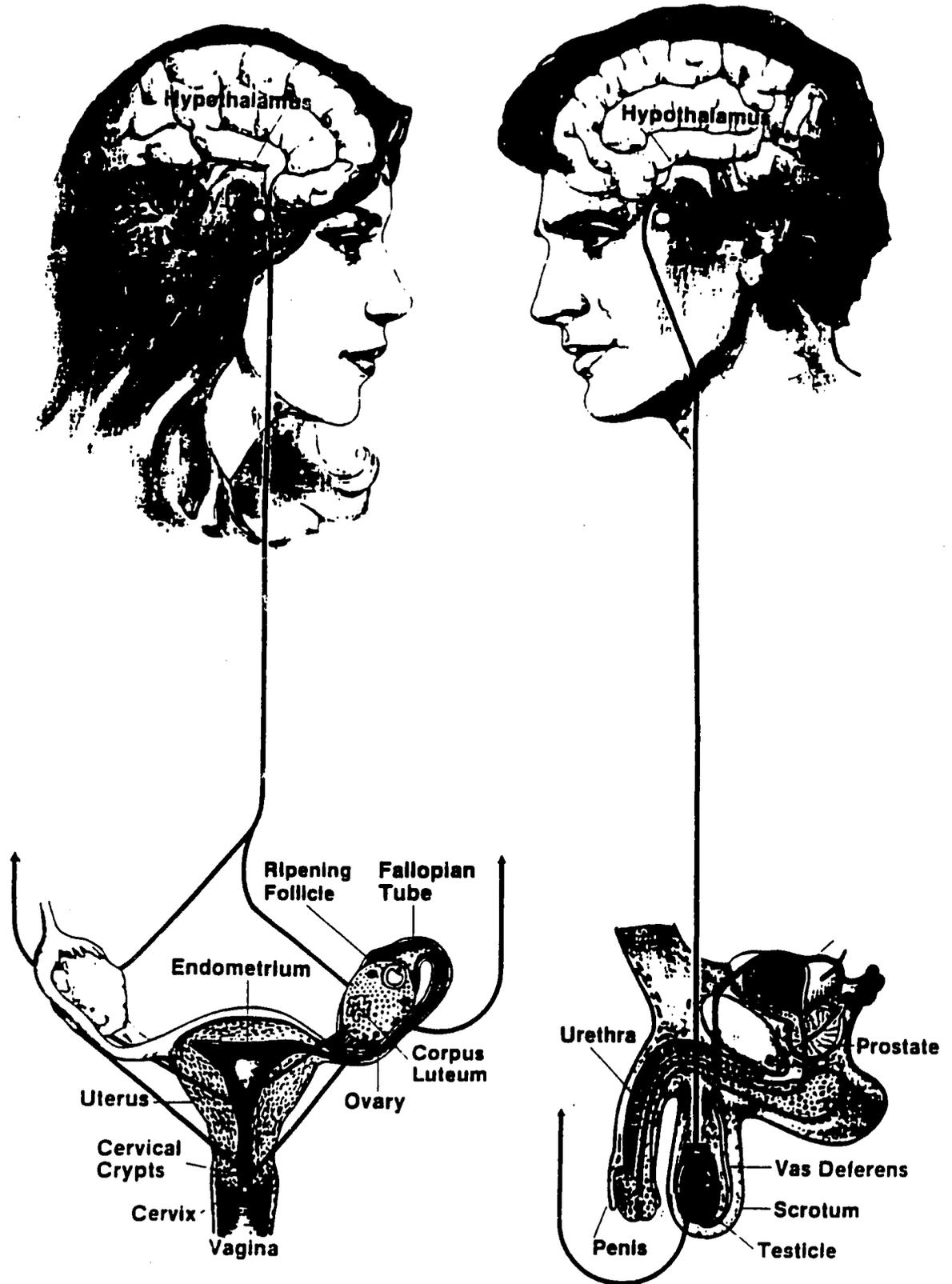
When Mucus Patches Appear
The woman shows a pattern of mucus patches when she fully breastfed her baby and had a BIP of mucus. This means the woman's body is not producing enough breast milk to suppress ovulation. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

WHEN WEANING



When Weaning
The woman shows a pattern of weaning when she fully breastfed her baby and had a BIP of weaning. This means the woman's body is not producing enough breast milk to suppress ovulation. The BIP is a sign of ovulation and pregnancy. It is important to wean the baby at the beginning of the cycle.

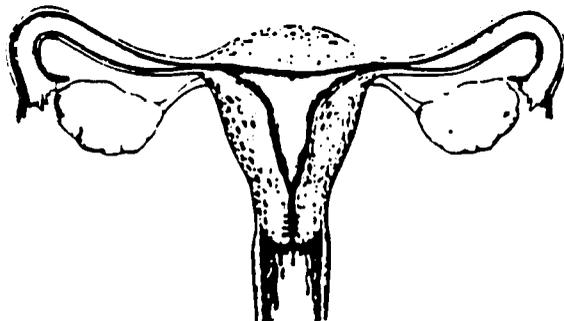
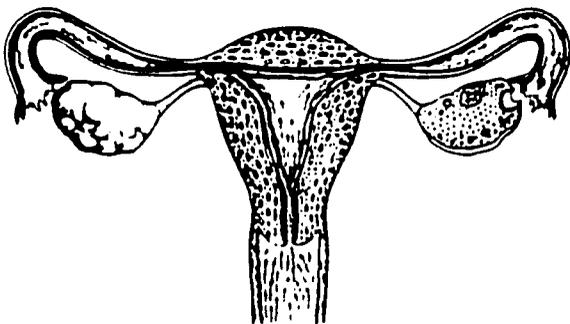
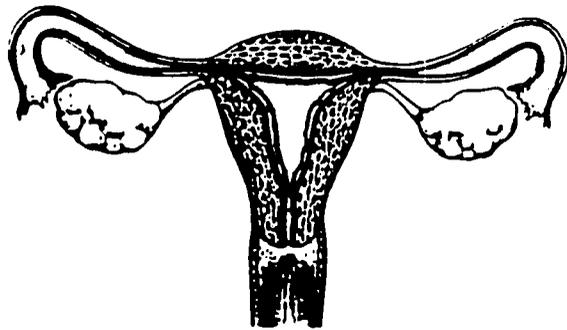
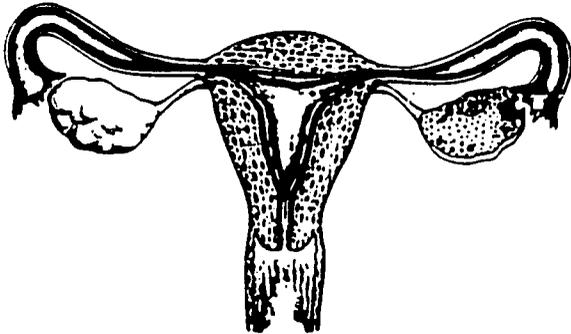
ANATOMY AND PHYSIOLOGY OF THE REPRODUCTIVE SYSTEM



NATURE AND HUMAN FERTILITY

FERTILE TIMES

INFERTILE TIMES



Appendix G

Comments of One Evaluation Team Member

Appendix G

Comments of One Evaluation Team Member

The evaluation report represents in large part a consensus among the evaluation team members. Where there were divergent perspectives, every attempt was made to balance and integrate these perspectives. One evaluation team member, Dr. Patricio Mena (who was nominated as a team member by FAF¹), provided 46 comments on the text, most of which have been integrated in the report. Several of Dr. Mena's comments were not included in the body of the report because they were deemed by the other two team members to be either factually inaccurate, unsubstantiated, beyond the scope of the evaluation, or in conflict with the other team members' interpretation of documented evidence regarding this project. However, to ensure that all of Dr. Mena's comments are presented, the seven not incorporated within the text of the report are included below, with specific reference to page numbers.²

1. page ix, Cooperating Agency Relationship. Eliminate paragraph 1, replace with: "The stormy and intense review process associated with this project indicates lack of cooperation."
2. page x, add following sentence between paragraph [recommendation] 1 and 2: "It is necessary to remember that BOM (Billings Ovulation Method, Inc.) is a Patent Product, therefore the owner's authorization is mandatory for any adaptation or change." [BOM is not patented but copyrighted; the report states that copyright conventions must be observed.]
3. pages 8-9, replace paragraphs [recommendations] 1 and 2 with: "Because there is no agreement between F.A.F. and A.I.D. about intended audience and technical definitions about Film, we cannot suggest any action until these points are settled."
4. page 11, add to last full paragraph, after fourth sentence: "Today is frequent a Video and TV in 3rd World. I suggest convenience in stimulating, and if necessary to authorize, video copies by A.I.D."[sic]
5. page 12, add to fifth paragraph of 2.3.1: "In Latinamerica [sic] there is no confusion or shock, all seems logical to BOM users."
6. page 13, point four, change first sentence to: "In places where distribution of more BOM instruction materials is the priority, there should be independent testing, without priority for different materials."
7. page 34, section 6.3, add after second paragraph: "I do not have evidence about political pressures."

¹The team selection process for this evaluation differed from the standard procedure followed for A.I.D. Population Program evaluations in that FAF maintained the right to approve or reject formally each member of the team and to nominate directly one team member.

²Dr. Mena has continued to issue additional comments which are at considerable variance with his initial ones presented here. His later comments have essentially abandoned his key critiques of the FAF project. This report is based on the team's initial perspective and subsequent written comments on the draft.

64