**1. PROJECT TITLE**
American Institute for Free Labor Development (AIFLD/B) (AID/LAC-CA-1332)

**2. PROJECT NUMBER**
511-0043

**3. MISSION/AID/W OFFICE**
USAID/Bolivia

**4. EVALUATION NUMBER**
Enter the number maintained by the reporting unit e.g., Country or AID/W Administrative Code, Fiscal Year, Serial No., beginning with No. 1 each FY: 511-81-1

**B. KEY PROJECT IMPLEMENTATION DATES**

<table>
<thead>
<tr>
<th>A. First FY</th>
<th>B. Final FY</th>
<th>C. Final FY</th>
<th>Pro-AG or Obligation Equivalent</th>
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**6. ESTIMATED PROJECT FUNDING**

<table>
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<tr>
<th>A. Total $</th>
<th>B. U.S. $</th>
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**7. PERIOD COVERED BY EVALUATION**

From (month/yr.) April, 1979 To (month/yr.) December, 1980

**8. NAME OF OFFICER RESPONSIBLE FOR ACTION**

AIFLD/CPD

**C. DATE ACTION TO BE COMPLETED**

2/5/81

**1. ACTION DECISIONS APPROVED BY MISSION OR AID/W OFFICE DIRECTOR**

1. Prepare a detailed report of the project for the evaluation period. The report (to include accomplishments, lessons learned, and recommendations for possible future labor programs in Bolivia) is to serve as and be incorporated as an Annex to the PES.

2. Review of AIFLD/CPD report.

3. Revise the project agreement, logical framework, financial plan and implementation plan, as appropriate, should the program be reactivated in Bolivia. Implementation plan revision should incorporate recommendations of prior Country Program Director (CPD) course curriculum for courses and conferences described in PES and AIFLD/CPD report.

**9. INVENTORY OF DOCUMENTS TO BE REVISED PER ABOVE DECISIONS**

- Project Paper
- Financial Plan
- Logical Framework
- Project Agreement
- Implementation Plan
- PIO/C
- PIO/P
- Other (Specify)

**10. ALTERNATIVE DECISIONS ON FUTURE OF PROJECT**

A. Continue Project Without Change
B. Change Project Design and/or Change Implementation Plan
C. Discontinue Project

**11. PROJECT OFFICER AND HOST COUNTRY OR OTHER RANKING PARTICIPANTS AS APPROPRIATE (Names and Titles)**

Enrique Perez F. Embassy/Labor Attaché
Letitia A. Kelly, USAID/B Project Manager
Donald Ellenberger, CPD AIFLD

**12. MISSION/AID/W OFFICE DIRECTOR APPROVAL**

Signature

Typed Name Malcolm H. Butler

Date December 18, 1980.
13. **SUMMARY.** - This Project Evaluation Summary is designed to respond to the evaluation requirements of both AIFLD/Washington and USAID/Bolivia. It covers the period from April 1979 to March 1980 (as required by AIFLD/W) and adds the period March 1980 to the present (for USAID/B purposes).

During most of the combined period in question, the AIFLD/B project prospered under the leadership of the Country Program Director (CPD), Donald Ellenberger. April 1979 - March 1980 was a period of consolidation, program revision and successful completion of project goals. AIFLD's efforts during this politically sensitive period to strengthen and consolidate Bolivia's fragmented trade union movement - an amalgam of "democratic" and "leftist" locals and national confederations - far exceeded normal expectations. However, beginning in April 1980, the political situation in Bolivia became very tense and led to the military coup of July 17, 1980. This coup created an untenable environment of restriction and intimidation for Bolivians and foreigners alike, particularly for those active in trade union affairs. The situation led to the AIFLD/B CPD being withdrawn in early August and the program being formally suspended on August 27, 1980.

14. **Evaluation Methodology.** - The primary purpose of the evaluation was to measure progress and assess the impact of the project in the following areas: the development of new union leadership, the strengthening of the organized campesino movement, and the improvement of relations of local trade unions and federations with international labor and labor oriented organizations. The evaluation for the April 1979 - March 1980 period was carried out in June - July 1980 by the Labor Attache. The evaluation for April - July 1980 period and consolidation of the two evaluations was done by the Labor Attache and the AID project manager in October - November 1980.

The methodology used by the evaluators included the review of available documents supplied by the AIFLD CPD, interviews with AIFLD local project personnel, first hand observations of AIFLD activities by the Labor Attache during the evaluation period, and the review of existing AID financial records. The transfer of all documents regarding the AIFLD/B programs to Lima for security purposes in June 1980, as well as the withdrawal of the AIFLD CPD, prevented the evaluation team in quantifying the progress towards achieving objectives and performance of activities, thus making this evaluation more general than it otherwise would be.

15. **External Factors.**

a) Turbulent political environment: Two military coups took place during the period of this evaluation—the first, bloody but unsuccessful, and the second, very repressive and successful to date. The latter coup has resulted in the abolition of all trade union rights, and the imposition of state-appointed leaders to most leadership positions in the unions. In this regard, the AIFLD/B program was able to continue functioning after the first coup, and, in fact, from November 1979 to June 1980, the unions
gained in strength and AIFLD operated very effectively. Then, coinciding with the June campaign to oust the U. S. Ambassador, anti-democratic forces stepped up a campaign of terror and intimidation against the trade union movement which adversely affected the educational and social project activities of AIFLD/B here. Finally, the outlawing of unions in July 1980 and the repressive nature of the military regime necessitated the withdrawal of the AIFLD/B program to insure the safety of its American and Bolivian employees and in accordance with U. S. policy objectives towards Bolivia.

16. **INPUTS.**—The log frame inputs planned for the period 4/1/79 - 3/31/80 included the following:

a) **Budget:**
   $152,000 - The budget was adequate in view that some activities were not carried out during the evaluation period due to the sensitive relationships between the government and the labor unions and federations.

b) **Personnel:**
   1 CPD-US, 1 Sub-Director - TCN, 1 Education Coordinator - Bolivian, 1 Special Labor Program Consultant - Bolivian, 1 Social Projects Coordinator - Bolivia (12 p/m each).
   
   The review as well as the close working relationship established between the CPD and the Labor Attache, resulted in the timely hiring and provision of services of AIFLD's local staff.

c) **Seminars:**
   Basic Leadership (15), Intermediate Leadership (15), Advanced Leadership (10), ITS (2), Conferences (10).
   
   Union specific training sessions were carried-out on schedule while general conferences were reprogrammed for additional national level one week trade union course.

d) **Participant Training:**
   George Meany Center Scholarships (15).
   
   A reduced number of planned labor leaders participated in U.S. training programs due to their involvement in Bolivian labor issues.

e) **AIFLD Social Development Activities:**
   $1,100 - Projects were initiated and/or planned for the amount programmed.

f) **Technical Services:**
   $2,000 - Technical services were provided or had been programmed for local labor unions in administration and financial management.
g) Budget Support: $13,800 - The programmed budget support was adequate in view of the delays incurred due to the delicate political situation during the evaluation period.

According to the CPD, and as confirmed by the Labor Attache, all of the above inputs were being met according to schedule within the evaluation period until the political situation began to interfere with the implementation of the project. This was achieved largely through the efforts of the CPD, who at times had to act not only as project manager, but as a diplomat and harried political analyst. The AIFLD project also received adequate backstopping and timely inputs from AIFLD Headquarters, as well as from USAID/B and AID/W.

During the evaluation period, the CPD thoroughly reviewed the educational course structure of the original implementation plan and recommended a change of mix of courses and conferences in order to better address key labor union needs in the political environment of President Lydia Gueiler's administration. The new mix, which had been approved by the Labor Attache and AID program manager, will now have to be looked at again when political conditions in Bolivia permit the re-initiation of the AIFLD program in Bolivia. Specifically the CPD recommended substitution of 5 one-week National Courses in administration and management for specific individuals in lieu of a series of specialized courses to be imparted to groups of unions (i.e., 1 four-week Mixed National Course, 2 Labor Code Analysis Conferences and 10 Special Labor Conferences). The changes in courses do not represent an increase in the training input budgetary line item, and in fact may reduce the costs in some cases due to the increased utilization of the membership of local unions in imparting the sessions.

17. OUTPUTS. The log frame outputs planned for the period 4/1/79 - 3/31/80 included the following:

a) Union Leader Course Graduates
   - Basic and Cooperative Courses  800
   - Intermediary/Advanced Courses  1,500

b) Educational Units
   - Units Established in Federations/Confederations  2
   - AIFLD Graduates Teaching in Units  10

c) Social Service Units
   - Units Established in Federations/Confederations  2
   - Social Service Projects Implemented by AIFLD Graduates  9
d) Campesino Leader Participation

- Participation in Cooperative and/or Community Development Projects 58
- Projects Implemented by AIFLD Graduates 6

e) Integration with International Democratic Trade Union Movement

- Local Trade Unionists Exposed to Int'l Leaders 300
- Unions Affiliated to Int'l Labor Organizations 38
- Local Affiliates' Coordinated with ITS/ORIT Courses 3

For the reasons denoted in 14, Evaluation Methodology, the means of verification of the above outputs was based on first hand observations and familiarity with the project by the Labor Attache. According to the CPD and the Labor Attache, all of the above output targets were being met by AIFLD/B for most of the period covered by this evaluation. The output level achieved under the adverse and challenging circumstances within the country is attributable to AIFLD's highly capable project administration under the CPD, as well as to the effectiveness of its courses in motivating local trade union and campesino leaders.

18. PURPOSE.- The purpose of the AIFLD project in Bolivia has been "to strengthen the democratic labor movement of Bolivia through improvement of its leadership, development of collective bargaining capacity and encouragement of the democratic operation of worker organizations responsible for the interests of their members."

In having met most input and output implementation targets for the 4/1/79 - 3/31/80 period -- training approximately 1,450 representatives of different unions through some 42 courses carried out within extremely difficult political conditions -- AIFLD/B had made great strides towards achieving the project purpose. It played a key role in strengthening the ten major national democratic labor federations and confederations -- specifically, the improvement of their self-management and budgeting capability, as well as their ability to extend legal, research, collective bargaining and educational services to their members.

19. GOAL/SUB-GOAL.- AIFLD's goal aimed to "increase participation" of Bolivian workers in economic and social development." AIFLD, as part of our overall development effort in Bolivia, worked towards the achievement of this goal by assisting Bolivian labor leaders to create a democratic labor movement capable of defending its members' interest
while working within the legal framework of the nation. Collective bargaining, labor law, contract interpretation, and other specialized labor courses provided by AIFLD to Bolivian union members helped to strengthen this movement until the July 17, 1980 coup. The subsequent prohibition of union activity and accompanying repressive actions by the new government are testimony to the fact that democratic labor institutions were gaining strength. This is in no small part due to the technical assistance provided by AIFLD over the years.

20. BENEFICIARIES.- The direct beneficiaries of the AIFLD/B project during the evaluation period were the approximately 2,300 union leaders who participated in training courses and/or participated in social service projects. Regarding the composition of course participants, AIFLD made a special effort to incorporate labor union and campesino women leaders whenever possible. Indications suggest that the overall impact of the courses have had a positive effect - specifically, in a country where strikes and stoppages are common place because many union leaders are ignorant of the country's labor laws and of elementary principles of trade unionism, it was found that unions led by members taught by AIFLD are less prone to use strikes to achieve ends otherwise achievable through dialogue.

21. UNPLANNED EFFECTS.- No unplanned effects ensuing from this project have been observed.

22. LESSONS LEARNED.- After only a short while on the job, the new CPD saw the need to re-focus the AIFLD educational program to impact more directly on the Bolivian labor scene. Rather than continue holding seminars on a multi-union and multi-sector basis, the emphasis upon program re-initiation should be to work with unions and federations within the same sector. The principal reasons are: 1) committing resources per sector will allow for more involved trade union education and leadership training within that sector; 2) multi-union work does not involve AIFLD enough with any one sector; and 3) multi-union activities are difficult to plan and implement due to difficulties experienced with the Ministry of Labor.

23. SPECIAL COMMENTS OR REMARKS.- Bolivian trade unionists that attended AIFLD seminars greatly benefitted from the courses; many even risked their lives putting their knowledge to work. Their activities were subsequently curtailed severely, however, when the political changes resulted in their persecution. Several recent graduates of AIFLD programs were jailed; some sought asylum in embassies in La Paz; some left the country surreptitiously; and some lost their jobs. The present regime has banned all union activity, is choosing new leaders to replace democratically-elected ones for new "union" organizations, and plans to not only restructure the existent labor movement but also rewrite Bolivian labor legislation in general to increase its hold on the working class.

It is therefore probable that as long as this situation remains unchanged, a renewed and fully-active AIFLD program will be impossible in Bolivia.