INDISCO Guidelines No. 5

"our project"

Participatory Project Planning and Evaluation for and by Indigenous and Tribal Peoples

INDISCO Programme

International Labour Office, Geneva

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Participatory Project Planning and Evaluation for and by Indigenous and Tribal Peoples

Prepared in consultation with indigenous and tribal peoples
and INDISCO field staff
by

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Foreword

The ILO-INDISCO Programme, which was launched in 1993 under DANIDA funding, has been assisting indigenous and tribal peoples' organizations in more than 10 countries in Asia, Africa and Central America in designing and implementing their own development projects. The role of INDISCO in this process has become increasingly facilitative, concentrating more and more on strengthening the capacities of indigenous and tribal leaders in community development and awareness of their fundamental rights, and transferring project management responsibilities to the indigenous and tribal partner organizations.

In order to capacitate indigenous and tribal peoples' organizations and their leaders and staff, INDISCO prepared a series of guidelines, which were tested and finalized by the project partners, printed and disseminated by the ILO. Some of these guidelines have already been translated into local and indigenous languages by the project staff in India, Thailand, Vietnam, Laos and Belize.

The latest INDISCO publication, *Our Project,* is the fifth in a series of guidelines and deals with the procedures of participatory project planning, implementation, evaluation and phasing-out. The last two parts on participatory self-evaluation and end-of-project procedures have been tested separately several times since 1996 by INDISCO projects in India, the Philippines, Thailand and Vietnam.

Huseyin Polat, INDISCO Programme Coordinator, is the initiator and original author of these guidelines. Mr Polat has discussed the contents several times with INDISCO partner-NGOs, INDISCO National Coordinators and project staff in the field as well as with the Programme Evaluation Unit (PROG/EVAL), the Cooperative Branch, IPEC and other units of the ILO in Geneva. The format and contents of ILO's training manual on *Design, monitoring and evaluation of technical cooperation programmes and projects,* was used as a base. Ms Anne-Brit Nippierd, Gender and Training Specialist, Cooperative Branch, and Mr Roald Gustafsson, INDISCO Training Consultant, reviewed and edited the text.

We believe that these guidelines, *Our Project,* will contribute to the work of INDISCO in capacitating indigenous and tribal peoples to effectively manage their own development.

August 2001
Cooperative Branch
Geneva

The use of this booklet

This booklet is prepared for leaders and members of indigenous and tribal communities who will be involved in the planning and evaluation of ILO/INDISCO projects.

The purpose of the booklet is twofold:

- It may be studied *individually*.
- It may be used in a *workshop*; as a *programme outline* and as *session notes* for the workshop facilitator.

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PART I
PROJECT PLANNING

Introduction

Background and justification

Beneficiaries

Strategy

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Objectives

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Monitoring, reporting and evaluation

Introduction

What is a project?

We, a group of villagers, are repairing and extending a storehouse. We have talked about this for some time, now we have collected some material and we asked some other villagers to help in the work and it is soon finished.

We have actually carried out a little **project**. It did not take many days and it did not cost much money, but we can still call it a "project". It was a joint effort that will improve the conditions of our community.

A project may be a small job like this one, with only a few persons involved. But sometimes projects are much bigger; a whole community may work together in a project. It may take a long time, maybe some years, and it may cost some money, too. But the people do it because they believe that the project will be good for everybody in the village.

Indigenous communities or tribal groups have started many projects. What can such projects do for the people? Here are some examples:

- Improve the water supply in a village.
- Create income opportunities for women and men.
- Build a road.
- Educate people about their rights.
- Set up a cooperative business.
- Organise a savings and credit scheme.
- Start selling handicraft products.
- Help in preserving the traditional culture

... and many other things.

Many projects have been successful, because everyone in the community has agreed to the project idea and helped in the work. The result has been that the indigenous group has become stronger. They have not given up anything of their traditional systems and way of life, but their conditions have improved.

Resources

In addition to local resources available (labour, land, premises and other in-kind contributions), to implement projects, inputs from outside (like trainers, advisers, capital and equipment) are also needed. It is, therefore, common that projects look around for **partners** that can help provide such inputs.

One organization that is engaged in development projects all over the world is the **International Labour Organization (ILO)** which is part of the United Nations family. ILO has developed a special programme for the purpose of assisting indigenous and tribal groups with their projects. This programme is called **INDISCO.**

INDISCO can also help to find a financial source for the project, a **donor**.

Collaboration in a project

A project may thus be a collaborative effort between these three partners:

- **We, the indigenous and tribal community.**
- **INDISCO.**
- **The donor.**

We are, as indigenous and tribal community, the host and have asked and invited the other two partners to assist in the project. How can the other partners help, what should

they do? Obviously, there must be an **agreement** on how the project should be organised, **who** should do **what** and **when.**

- **We, the indigenous and tribal community** must make sure that the project is just right for us, exactly what we need and want. We must say what we want to achieve, which work we are prepared to carry out, and when we will do it.
- **INDISCO** must say exactly what the ILO can do to ***facilitate*** the work of the indigenous and tribal peoples and ensure that the ILO has staff, time and money for this work.
- **The donor(s)** will set aside money for the project, but they may not like to pay anything until they have a document showing how the money will be used and what will be achieved by the project.

A Project Document

So the three partners have to work out a plan where all these matters are regulated. Such a plan is called a **Project Document**. It is like a **contract**, which specifies the obligations of each partner. It also guides the management of the project and provides the basis for evaluation. This is the most important document for our project.

The Project Document will be used during the project period when we want to check that we are "on the right track", and it will be used after the project when we are going to check that we have achieved what we wanted and that we have achieved what we had promised. We, the indigenous and tribal community, and the ILO/INDISCO staff have a lot of planning to do before the Project Document is ready for signing by the three partners.

On the next page you can see the headlines and the contents under the main chapters of a typical Project Document used by ILO/INDISCO. The final document may look a bit different, but for the planning in the initial stage this will do.

The terms and the wording are not always easy to understand, but in this booklet we will take a look at the planning work, step by step, and describe in simple terms how the planning can be done and how a Project Document eventually can be prepared.

To make you familiar with a typical ILO/INDISCO Project Document, we will use the same headlines here in these Guidelines as in the Project Document.

Contents of a Project Document

(A Summary Project Outline)

Headlines:	Questions to be answered in the Project Document:
BACKGROUND AND JUSTIFICATION See page 15.	• *What is the **situation (the problem)** that indicates a need for a project?* • *How does it fit in with development **priorities?***
BENEFICIARIES See page 21.	• *For whose **benefit** is the project undertaken?*
STRATEGY See page 25.	• *Which **strategy** (type of project) is most suitable in this situation?*
PARTNERS (INSTITUTIONAL FRAMEWORK) See page 27.	• *Who are the **partners** in the project?* • *What are the **responsibilities** of all partners involved?*
OBJECTIVES See page 33.	• *To what development goal is the project expected to contribute?* (Development Objective) • *What are the **changes** the project itself is expected to bring about in the near future? (immediate objective)*
OUTPUTS AND ACTIVITIES See page 39.	• *What will the project **produce or deliver?*** • *What will the project **do,** to make sure that the products are produced?*
MAJOR INPUTS See page 45.	• *What **funds, expertise, equipment,** etc. are needed?* • ***Who** will provide these inputs?*
MONITORING AND EVALUATION See page 47.	• *When will **workplans, progress reports and self-evaluations** be prepared?* • *When will **independent evaluations** be carried out?*

In the following chapters we will go through, step by step as outlined above, what we have to think about when we draft a Project Document.

Background and justification

Questions to be answered in the Project Document

- ***What is the situation (or problem) that indicates a need for a project?***
- ***How does it fit in with development priorities?***

Why a project?

When we inform ILO/INDISCO that we are interested in starting a project in our community, they will certainly ask: Why?

In other words: To convince ILO/INDISCO and a donor that their support is needed we have to describe the **background** to our present situation, and we have to convince them that a project will be the right way to go forward. We must show that the project is really **justified**, otherwise ILO and the donor may prefer to spend their money and other resources where they are better needed.

Therefore, the very first chapter in the Project Document deals with the background and the justification of the project.

Identifying the problems

A project is started because someone is not happy with the present situation and wants to do something about it. But you cannot do something until you know what is wrong.

Sometimes it is easy to see what the problem and the solution is. An example: The women in the village produce

nice mats, but they earn very little money from this. The traders who come and buy the mats, however, make a very big profit for themselves by selling these mats in the market.

In this case it seems logical to organise the sales of the mats directly to the customers, maybe through a local cooperative owned and run by the women themselves and, in that way, increase their income.

In other cases it is not so obvious what the problem is, even though there are many signs that "something is wrong." An example: Most of the families in an indigenous community have a hard time to earn an income and feed their children properly. Nobody can say exactly what should be done to improve the situation.

A survey

In this case we have to look deeper into the community and look for reasons to the present problems. It might be necessary to make a comprehensive **survey**. That means that we put together all facts about life and living conditions in our community. Those carrying out the survey should talk to all people, find out their situations with regard to education, health, economy, land, employment, income and so on. They should, **together** with the families, try to identify the present problems and also discuss their ideas about the future.

What will the people think about this survey? Will they collaborate and contribute by talking openly about everything? Maybe the customs and traditions in the tribal group imply that the elderly leaders do all the talking? It may be difficult for the young people or the women to speak out freely. If so, the survey team may have problems in collecting all the relevant information.

To carry out such a survey is rather difficult, and a big job. But people can be trained to do it properly. ILO/ INDISCO can arrange such training for the survey team of indigenous and tribal peoples, and help to carry out a survey as a preliminary project activity. This type of survey is called a **baseline survey** or a **PRA**, a Participatory Rapid Appraisal.

If the survey team is doing a good job they will enjoy the participation of everybody in the community, leaders, men and women and youngsters alike. This is then a very good start to a possible project, because everybody will start thinking about their situation in a creative way, they will feel that they have a role in the development of their own society, they will increase their knowledge about problems around them and possible ways of solving them, and will generally become interested in development matters.

The survey team must not forget to consult and seek advice from other organizations which are active in the area, such as local government authorities, cooperatives, self-help groups and NGOs.

The findings of the survey team will reveal the shortcomings in the community. We can now see what needs to be done. The survey forms the base for a **project proposal.**

Priorities

A survey may open our eyes to several problems, which may or may not be related to each other. An example:

Suppose that the general opinion in the community is that the major problem is the high unemployment rate. But other problems have also been mentioned in the survey. We can make up a list of the problems:

- Lack of employment opportunities.
- Lack of funds (credit) which prevent expansion of farming activities.
- Land problems, confusion about ownership of ancestral land.
- Low level of literacy, especially among women.
- None of the women earn any cash income.
- Poor sanitation and health.

Some of these problems may be related to each other. Some problems may be more urgent to solve than others. If we start a project, which problems should we deal with first? Maybe we should have a separate project at a later stage for some specific problems?

We have to set the **priorities**. Everyone in the community should participate in identifying the problems during the survey and in setting the priorities afterwards. A priority list will help us to concentrate on the major and most important problems, rather than wasting time on discussing everything in general.

Summing up the problem

If we have carried out a comprehensive survey, as outlined above, we have enough material to describe the situation that requires a project. We need not include all the details from the survey, but all the facts that are useful for a general analysis of the problem should be written in the Project Document, under the heading "Background and Justification."

Peoples' ideas about a "project"

The idea about a possible "project" may come up in the discussions with the community members during the survey and at other times. Some people in the villages may already

have heard about projects of different types, and they may be hesitant when they hear about plans for a project in their community.

The people may have different ideas about projects. Some people may still not see the need for any development project, no need for any changes. Some are afraid of outside interference. Some have heard about "bad" projects.

The fears may be justified and they should be discussed by everybody, men and women alike, and not just by the leaders. We have to bring up the following matters in the meetings:

- Development projects are supposed to bring "change" to a society. But while new ways and methods are introduced, should old ways be abandoned? What about our **culture**? The special valuable old traditions and practices in our culture must be protected against change! Is there a risk that our **identity** will be lost when "development" comes?
- Most outsiders know very little about our culture. Are they the **right persons** to advise us?
- Sometimes projects have been started by outside organizations, but the outsiders have not listened carefully to the indigenous peoples. Authorities at the top have taken decisions and the words have been passed down to the people in the villages: "this is what you should do." Such projects have not been popular. How can we avoid this **"top-down"** planning?

The project should not begin until the indigenous community has satisfactory answers to these questions. Is it possible? Yes, the answer is very simple!

- The indigenous peoples should be involved in the project design from the very beginning and **themselves** decide about their project. This doesn't mean that just the leaders or village heads should decide on behalf of everybody else, but that all those involved, or who will be affected by the project, should have a say in how it should be designed. The indigenous community should be an active partner in the writing of the Project Document. In this way we can make sure what the **aim** of our project will be, what **work** will be done, **who** will work in the project, etc. All this will be written into the Project Document. Also peoples' ideas about the project, their readiness and acceptance of the project should be described in the Project Document under the heading "Background and Justification."

Beneficiaries

Question to be answered in the Project Document:

- *For whose benefit is the project undertaken?*

Direct or indirect?

It is indigenous and tribal peoples, of course, who will **benefit** from the project in the long run; the project belongs to them.

Suppose that we have a project working with institutional development, for instance, the strengthening of a Cooperative. In that case the project will first train the manager and other staff of the Cooperative, educate the committee-members, etc. They are the **direct recipients**, i.e., those who actually receive the first training—so it looks like only that small group of people will benefit from the project. But the intention is that all the people in the indigenous community will benefit from the project. They are the **intended beneficiaries**. When the staff has been trained and the Cooperative is in full operation all the other people will receive the benefits of the project.

The term "beneficiaries" is always used in Project Documents because it is important to clearly show how many people will benefit from the project and that it will be worth the effort of the partners involved in the work. A

Integration of gender issues in projects

To ensure that gender issues are effectively integrated into projects:

- We must take into consideration the needs and interest of women at the beginning of the project planning and design stage.
- We must gather and analyse information on different roles and needs of women and men, and use it in the development of project strategies.
- Women, and their organizations, should be actively involved in the formulation and implementation stages of the project.
- We should analyse the impact of the project on women and men during the monitoring and evaluation stages, and take appropriate action.
- Everyone involved in the project should feel responsible for the promotion of equal opportunities between women and men. If there are inequalities, the project should plan for and utilize specific gender expertise throughout the project cycle.

(Adapted from the ILO CD Rom: "Design, Monitoring and Evaluation of ILO Programmes and Projects: An Interactive Training Programme", ILO, Geneva)

description of the male and female beneficiaries is therefore included in the Project Document. It should contain all relevant data, such as the number of people and the socio-economic characteristics of the group such as differences with regard to age, education, skills, income, ethnicity, cultural practices, etc. The situation of the women and their role in the society is of particular interest. Therefore, a gender analysis and planning should also be included (see Annex 1 on Gender Analysis and Planning).

If we have earlier carried out a "baseline survey" (see page 16) we have already collected all necessary statistics and

information and it will be easy to prepare a description as outlined above.

Peoples' participation

Nothing will come out of the project if the beneficiary group is not involved from the very beginning. We have said that before, but it must be said again. In connection with the description of the beneficiary group in the Project Document it should also be defined generally **how** people will participate in the project.

Strategy

- **Question** to be answered in the Project Document: *What strategy (what kind of project) is most suitable to improve the situation?*

Strategy — what kind of project is needed?

Through our initial planning work we have identified the problems which the project should focus on.

The next question is **how** the project should work, which **strategy** should the project choose to reach the group who will benefit from the project. These are the alternatives:

- **Direct support**

Direct support means that the project works directly with the people. The project itself organizes education and training for the people in the community, it organizes other activities that are needed to solve the problems, it may provide some equipment, etc.

- **Institutional development**

Institutional support means that the project supports some local institution, which is working for the development of the indigenous community. For instance, a **Cooperative** can be supported by a project, because it helps to create employment through production of handicraft products, provision of credit, distribution of agricultural produce and so on. Other types of organizations may also be selected for

support by the project if we trust that this will benefit the indigenous people.

- **A combination**

A combination of direct support and institutional development is quite common and this is the strategy taken by INDISCO. For example, INDISCO projects organize literacy and skills training for indigenous and tribal peoples, and provide basic tools and equipment to be used in employment and income generation activities (direct support). At the same time, INDISCO assists local institutions to develop capacities to replicate the project to benefit a larger number of communities through the provision of consultancy services to strengthen these organizations (institutional development).

How to apply a gender sensitive strategy

The type of strategies to be developed will depend on the type of project. However, according to ILO experience, the following general principles and practical measures have proven to contribute towards the promotion of gender equality:

- Stimulate the active participation and mobilization of women and their organizations.
- Raise awareness on gender issues.
- Develop a capacity to address the needs of men and women and promote gender equality.
- Include measures which address both practical and strategic gender needs.
- Avoid gender insensitive and gender stereotyping.
- Ensure that adequate financial and human resources are earmarked for the promotion of gender equality.
- Apply a multi-disciplinary and step-by-step approach.

Partners

(Institutional Framework)

Questions to be answered in the Project Document:

- *Who are the partners in the project?*
- *What are the responsibilities of all partners involved?*

The Project Document should make it quite clear who the main partners in the project are, what their commitments are and what role they play in the course of project execution. Let us take a look at a typical arrangement.

The main partners

1. The implementing agency representing the people

The group of indigenous peoples that wants to start the project and expects to benefit from it is "the host" for the project. A certain organization is usually identified and selected to represent the people as the host organization. This is so because it is impossible to call together all the people every time something should be discussed or done in the project. Instead, the host organization will ensure that all people are well-informed and participate when the project work is to be implemented. The host organization is therefore called **"the implementing agency."**

The implementing agency may be, for instance, the traditional *tribal association* or a *cooperative union*

established by the indigenous group or any other *non-governmental organization* (NGO) which is working for the development of the indigenous society.

The Project Document should include a thorough assessment of the implementing agency. Its structure, staffing (men and women), managerial, technical and financial capacity should be stated. Strong and weak points should be identified. Is there a serious interest and commitment among the leaders and staff to implement the project, have they been actively involved in the planning of the project, analysed their problems and suggested any solutions?

To have an honest and objective description, it may be wise to ask both insiders and outsiders to help prepare the description; for example, some of the leaders and managers, some members (men and women), an auditor or maybe an official from the Cooperative Department or Registrar's Office.

2. The executing agency — ILO-INDISCO

The second partner in the project is **ILO-INDISCO** which is supporting the implementing agency to ensure that the planned project activities are "executed" in an effective way, and is therefore called the **executing agency**. As INDISCO is an inter-regional programme, it is coordinated at the ILO headquarters in Geneva. But ILO regional and area offices assist in the coordination at field-level together with specially appointed national-level project staff.

3. The donor

The third partner is the **donor**. This may be an interested government or an organization anywhere in the world which is engaged in development work and willing to finance the project.

Cooperating agencies

In addition to the three main partners (the host, INDISCO and the donor) several other agencies may be associated with the project work.

Locally, a project will often collaborate with a number of institutions in the area such as local government units and NGOs of various types, cooperative organizations, indigenous associations, etc.

Let us take an example: Let us say that the aim of a project is to strengthen the cooperative societies which are operating in a certain area. All the societies belong to an apex organization called The Federation of Indigenous Peoples' Cooperatives. It is then logical that this Federation becomes **the implementing agency.**

Who should the **cooperating agencies** be? In our example we have several organizations which may be able to contribute to the project, either with advice or in other practical ways (as indicated in the brackets):

- The National Cooperative Federation is an apex organization for all the cooperatives in the country (support in training of cooperative staff, adaptation of cooperative byelaws according to indigenous culture, policy advice to the government on the promotion of indigenous and tribal peoples cooperatives).
- The indigenous peoples in the region have set up an association called Tribetrad which is working for the preservation of traditional culture (provision of lecturers for the project workshop on culture, history, traditions of the indigenous community).
- There is a privately-run organization called RDT, dealing with rural development and training. It has been established by young professionals from the

region (provision of lecturers and case studies for technical workshops on the projects, preparation of feasibility reports on rural employment promotion, etc.).

- The local Government has a Bureau for Business Development in the nearest town (consultancy in small enterprise development, provision of credit, etc.).
- The Government has a special Department for Indigenous Affairs (cooperation in using the project achievements for policy improvement, provision of experts to assist in designing culturally appropriate training curricula for indigenous children and youth).
- Another project in the region is promoting income-generating activities for women (organizing joint programmes on women entrepreneurship, traditional handicraft development and marketing, setting-up joint committees to manage revolving loan funds and promote savings mobilization among indigenous women, etc.).

Discussions should be held with these organizations regarding possible collaboration. In the Project Document we should include brief descriptions of the co-operating agencies and state how they will/their role contribute in the work of our project.

The Institutional framework

In the Project Document we should describe "the institutional framework" and define what the role of each organization is in our project.

Steering committee

A project with several partners and co-operating agencies may require the establishment of a **steering, as well as an**

advisory committee which should discuss and guide the project management on all operations and give advice on how the participating organizations should work together. A description of the composition and functions of such committees should be included in the Project Document. Ensure also that representatives of women's organizations and/or gender specialists from the partner-organizations are represented in the committees.

The Project Manager

One person will be appointed as Project Manager. His or her responsibility is to coordinate the work and see to it that the project is implemented as laid down in the Project Document. The Project Manager will work in the implementing agency together with other project-level staff.

Summing up

When we are ready with the chapter "Institutional Framework" in the Project Document we should have all these sub-headings, adequately filled in with names and descriptions of the organizations:

Implementing agency:	(The "host" organization)
Beneficiaries:	(Direct recipients and intended and indirect beneficiaries)
Co-operating agencies:	(to be identified)
Executing agency:	ILO/INDISCO
Donor agency:	(to be filled accordingly)

Objectives

Questions to be answered in the Project Document:

- *To what development goal is the project expected to contribute?* (Development objective).
- *What are the changes the project itself is expected to bring about in the near future?* (Immediate objective).

Two types of objectives

We have talked about different reasons for starting a project. An example: If many people do not know how to read and write, we have a good reason to start a project. If the project can help the people to learn this, we have achieved the objective. But to achieve this objective is not sufficient for the people's overall socio-economic development. We therefore believe that this project is only one step to be taken towards achieving overall development of our community. If several other projects in different fields achieve their immediate objectives, all these projects will contribute to the development goal of the indigenous and tribal peoples, i.e., socio-economic self-reliance of indigenous and tribal peoples.

Apparently, we have **two types of** objectives for our project work, like in this example:

- First we have the **immediate objective**: "People will be able to read.."
- Then we have the long-term **development objective**: "The project will contribute to the

economic and social advancement of the community.

Development objective

The development objective is the most important reason why we start a project, it describes what the people wish to achieve in the future, for example, the elimination of poverty.

One single project (e.g., a literacy project) may take a community one step closer to the development objective; another project (e.g., an agricultural project) may also contribute to the same objective. The ultimate reasons for undertaking these projects are stated as the development objectives in the Project Document.

It is expected that our project, if successful, will bring contributions to the development objective.

The people should be encouraged to discuss the meaning of their project, what will be the outcome in the long run? The "development objective" in the Project Document has to do with the future. It is important to everyone, especially the young people.

Examples of development objectives:

- The project will contribute to the economic and social advancement of the indigenous communities in the region.
- The project will contribute to the elimination of poverty among tribal peoples.
- The project will contribute to achieving self-reliance with regarding to indigenous peoples in region.....

Immediate objectives

The immediate objective is usually quite obvious. Still, there is a risk that we fail in our work because of poor

planning without clearly stated objectives. In a literacy project, for instance, we make a mistake if we think that one objective is "to organise an education programme." It is a mistake because it is what we **do** and not what we want to **achieve.** We should not be satisfied just because we get such a programme going. Suppose that the programme is implemented but the result is very poor for some reason and the participants still cannot read. The objective thus is not just to organize a course. Instead we should say what we want to **achieve**, for example, like this: "At the end of the project at least two hundred participants in the education programme should be able to read and write." Formulated in this way, such an objective would motivate both "teachers" and "pupils" to work hard all the time.

The best way to state an immediate objective is to say what the people or an organization should be able to **do** after the project. Then it is possible to control or to see if we have achieved the objectives.

A wrong objective

An objective like the following would not be very useful in project work: "The objective is to increase the competence of the staff in the cooperative union." This objective is not only expressing what the project will **do** but does it in an overly generic fashion. It does not express the required change.

A good objective

The following formulation is more useful: "At the end of the project, the functions of the Cooperative Union will have been strengthened and developed, enabling it to handle the receiving, storage and marketing of the members' agricultural produce in an effective and competitive way."

A project should only have a limited number of immediate objectives, that is not more than two or three that are possible to achieve. Remember that the immediate objectives should refer to male and female intended beneficiaries. In direct support projects, if special measures are needed to address the needs and interests of women, then a separate immediate objective should be formulated for this purpose.

Examples of immediate objectives:

- At the end of the project the Indigenous Association will be able to plan and implement a comprehensive domain management plan.
- At the end of the project, the service capacity and functions of the Indigenous Cooperative Federation will have been strengthened and developed, enabling it to organise savings and credit schemes among the members and to maintain and manage the operations in an effective manner.
- At the end of the project the income of the vegetable producers in Sawila will have increased on average by 60 per cent.
- At the end of the project, at least 40 farmers will be capable of maintaining, repairing and operating efficiently the new sawmill equipment.

Indicators of achievement

If we have not stated a clear objective, which is measurable and verifiable, we will not be able to know, after the project, whether we have been successful or not. But if we have agreed on how to measure the objective, it will be easier to check our progress.

It will be even easier if we can agree on some kind of **indicator(s)** of achievement, which give us clear **evidence** that we have achieved the objective.

It is so important to follow-up the work and make sure that the project is doing the right things, that it is recommended to write a list not only of the objectives but also the indicators in the Project Document.

Examples of indicators of achievement:

A *Objective*: The staff of the cooperative are capable of keeping the books properly.
Indicators of achievement:
- All members of the cooperative receive proper statements of their transactions.
- The committee receives proper financial reports in every meeting.

B *Objective*: The Health Clinic is capable of serving the five villages effectively in Lorunga region at the end of the project.
Indicators of achievement:
- The number of people from the villages visiting the health clinic in Westra have reduced by 80 per cent.
- The number of patients each week is comparable with neighbouring clinics.
- Two hundred women have attended information meetings arranged by the clinic.

Outputs and activities

Questions to be answered in the Project Document:

- *What will the project produce or deliver?*
- *What will the project do to produce the outputs?*

Outputs

When project staff and members of the community together begin working to achieve the objectives they have set out for the project, they will **produce** or **deliver** different outputs.

Suppose that this is the immediate objective:

- Increased number of women engaged in income-earning activities.

Those planning the project may have come to the conclusion that the following must "come out" of the project in order to achieve the objective:

- A training programme developed to train 60 young women trained on bamboo work and 10 women in marketing.
- Ten women trained in marketing.
- Sixty women trained in four-day courses on bamboo work.
- A marketing plan is produced.
- A centre built for exhibition of handicraft products.
- A credit scheme established to facilitate procurement of raw material.
- Eight hundred trays and 400 baskets produced.

In the Project Document we should include a list of the planned **outputs** from the project, i.e., what the project will produce. Note that the outputs can be a concrete thing, like a basket, but also something like a training programme or a certain group of trained men and women.

We can also see from the above examples that we should be as concrete and precise as possible and state quantities, etc., when we describe the outputs.

The key question when preparing a list of outputs is "What will be **produced** or **delivered**?"

Activities

The next logical question is:

- What should we **do** to produce these outputs?

Let us use the first output in the list above as an example:

- Sixty young women trained in four-day courses on bamboo work.

The activities that are necessary to realize this output must now be planned. After discussions and consultations with the experienced women, we may come up with a list of activities, as follows:

- Selection of instructors among the older women.
- Preparation of training programme, training of instructors.
- Selecting participants for the training.
- Obtaining equipment and material for the course.
- Arranging a training venue.
- Implementing the training.
- Evaluation of the training.

In the same way we have to prepare a list of activities that

corresponds to the other outputs. The key question when planning the activities is: "What will we **do**?"

There may be more details to include in this list. On the other hand, it is difficult to know about all the tasks in advance, before all the aspects and problems are known. Therefore, we have to be satisfied with a list of only the **main activities**, when we draft the Project Document. Then, at a later stage, the project management will prepare a detailed list which it will use as a **workplan**, specifying the dates for the beginning and completion of the activities (there is an example of a workplan on page 48).

Who should actually plan and prepare the list of activities? Naturally, those who will be involved in the training programme are the right persons to take on that responsibility. But they cannot sit alone in a group and decide what should be done. Again, collaboration and consultation with all those involved is very important. Especially the participants of a training programme should be involved. If they feel from the very beginning that they are "partners" and key persons in this work, not just invited participants or pupils, they will be committed and willing to contribute.

Examples of outputs and activities

The best way of presenting the outputs and activities in the Project Document is to list them together under each immediate objective as you can see from the following list.

Immediate objective

At the end of the project the literacy rate of women and men in the region will have increased by at least 80 per cent.

Output 1:
A programme for a literacy campaign developed.

Activities:

- Planning the entire literacy programme.
- Procurement of printed material needed for the programme.
- Preparation of other needed materials and equipment.
- Planning a series of village-meetings for information on the planned education programme.

Output 2:
A trained task force of women and men created.

Activities:

- Consultations with experts in the Ministry of Education.
- Selection and recruitment of 10 people for the task force (50 per cent women).
- Organization of a five-day training seminar for the task force.

Output 3:
Three hundred forty (340) women and men trained in basic literacy skills.

Activities:

- Conducting the information-meetings in the villages.
- Implementation of the first part of the programme.
- Evaluation of the first part of the programme.
- Implementation of the remaining part of the programme.
- Final evaluation of the programme.
- Adjusting the programme for new groups.

Immediate objective

At the end of the project the savings and credit cooperative will have improved its services, resulting in an increase in membership to 1,200 women and men.

Output 1:
A training programme developed to train 75 staff and committee members (half of whom are women).

Activities:

- Carrying out a survey (including a gender analysis) in the community on availability of and access to the savings and credit services.
- Analysing training needs and planning a programme.
- Conducting a series of seminars, focusing on the actual training needs (50: 50 female and male participants).

Output 2:
A member mobilization campaign undertaken.

Activities:

- Planning a series of information meetings in the community.
- Preparing information materials.
- Conducting the information meetings.
- Evaluation and following-up the campaign.

Immediate objective

At the end of the project, the area used for cash crop will have increased by 20 per cent.

Output 1:
A new water-pump set up at the reservoir in Pawo village.

Activities:

- Renovation of the old pumphouse.
- Tenders obtained for equipment.
- Procurement of equipment.
- Installation of the pump.

Output 2:
Six hundred metres of new irrigation pipe in place.

Activities:

- Preparatory digging work.
- Installation of pipes.

Output 3:
Ten hectares of land cleared.

Activities:

- Meetings for planning, work distribution.
- Preparatory clearing of the area.
- Area prepared for cultivation.

Major inputs

Questions to be answered in the Project Document:

- *What kind of inputs (cash, expertise, equipment, etc.) are needed to carry out the activities?*
- *Who will provide these inputs?*

The "outputs" from a project can be of many different types, as we have seen: trained people, surveys, health clinics, irrigation schemes, etc. But there will be no outputs if we do not provide some "**inputs**." What are the inputs?

Human resources

Certainly, the work requires people to carry it out, or human resources**:**

- Many indigenous people in the host organization (the implementing agency) will be engaged in project work.
- The local co-operating agencies may provide some consultants or assistants for work in the project for shorter or longer periods.
- The executing agency (ILO/INDISCO) will provide some advisers and consultants to facilitate the work.

Other inputs

Depending on the activities of the project, there may also be a need for various types of **equipment and material**. Examples:

- Equipment and materials needed in training and education programmes.

- Office equipment and consumables.
- Tools and other equipment and materials needed in special projects.

The partners in the project have to agree on how the required inputs should be provided and by whom. Material inputs can be provided either **in cash** or **in kind**.

The Project Document should contain a list of the **sources** and their contributions.

Example of inputs:

Inputs in the Mido Handicraft Project:

The Implementing Agency inputs (in-kind contribution):

- Provision of premises for training activities.
- Provision of premises for handicraft production and handicraft exhibitions.
- Labour in the production.

The Executing Agency (ILO/INDISCO) inputs (covered by donor contributions):

1. International consultants, four work months.
2. National consultants/handicraft instructors, four work months.
3. Salaries for Project Manager and five Extension Workers for 12 months.
4. Secretarial support for 12 months.
5. Duty travel.
6. Allocation for two seminars and two training programmes.
7. Office and handicraft production equipment.
8. Allocation for revolving loan fund.
9. Miscellaneous costs.

Monitoring, reporting and evaluation

Questions to be answered in the Project Document:

- *When will workplans, progress reports and self-evaluation reports be prepared?*
- *When will independent evaluations be carried out and by whom?*
- *How will the partners be informed?*

How is the project going? Are we on the right track? Will we achieve the objectives we have set out? Any problems? Any activities delayed? Do we need to modify our plans?

We can answer these questions only if we continuously **monitor** and **evaluate** the work undertaken by the project.

Monitoring

Monitoring means to follow closely what is happening in the project. This is necessary to ensure that the project is successful. It is important that any problems are discovered at an early stage and action taken immediately to put things right.

To make the monitoring effective it is a good idea to use two "management tools":

- A workplan.
- Progress reviews.

The workplan

In the Project Document we can see the list of expected

outputs and **activities**. Now, when we are going to start the work it is time to prepare a workplan. It will look almost like the list of activities, but it should provide some more details:

- A list of all the **jobs** to be done related to the "outputs."
- A **timetable**, i.e. dates for starting and completing the jobs.
- Name of persons **responsible** for each job?

Who should prepare the workplan? The Project Manager has the responsibility but, as usual, he or she cannot do it alone without discussing with the other people who are involved in the work.

Example of a workplan

Immediate objective: The household income of tribal women in Dumta village will be increased by at least 25 per cent.

Output 1: One demonstration garden established in each village.

Activity	*Dates*	*Resp*
1. Selection of land for demonstr. gardens	Jan.8-14	LO
2. Preparation of land in demonstr. gardens	Jan.15-Feb.12	AB
3. Planning of demonstr. programme, info. to participants	Jan.15-22	AB
4. Provision of seeds	Feb.5	CU
5. Implementing the demonstr. programme, 4 meetings/training sessions in each demonstr.garden	Feb14-Jul.18	AB

Output 2: *Participants' own gardens extended and reorganised.*

Activity	***Dates***	***Resp***
6. Participants provided with seeds	Feb.6-22	CU
7. Progr. for advisers visits to villages presented	Feb.14	AB
8. Advisers visit all villages, direct consultations	Feb.18-Jul.18	AB
9. Participants work on the extension of gardens	Feb.18-Jul.18	AB

Output 3: *Sale of vegetables organized through the cooperative.*

Activity	***Dates***	***Resp***
10. Prel. plan for vegetable marketing prepared by the Cooperative Union.	Dec.	CU
11. Transport of vegetables organised.	Feb.	CU
12. Participants informed during the 1st meeting of Activity 5	Feb.	CU
13. Particip. start delivering products to the coop.	Apr.	CU

etc. etc.

The progress review

The work plan looks *forward*: What shall we do? The progress review is done when we have worked for some time, and it looks *back*: What have we done? A **progress report** is prepared to inform all concerned on how the work is progressing. It should give answers to these questions:

- Are inputs being made available as planned?
- Are activities being carried out as laid out in the workplan?
- What changes have taken place, were any additions or amendments made to the plans?
- What problems and difficulties have been encountered?
- What remedial actions have been taken or are planned?

Evaluation

1. Participatory self-evaluation

A progress report prepared by the Project Manager gives account of what work has been carried out and what outputs have been produced, and whether work is being done as planed in the workplan. However, if we want to assess whether we are making progress towards achieving the immediate objective, we have to evaluate the work done by the project. The members of the community who have participated in the project are the best placed to judge whether the immediate objectives have been achieved, i.e. whether the project had provided some benefits for them. Therefore, our project participants or beneficiaries should be engaged in a "participatory self-evaluation exercise."

To organise a self-evaluation exercise has proved worthwhile for many reasons. People who take part in such exercises help both the project to function better and help

themselves, because the exercise is a learning experience as well. Participants will enhance their knowledge and understanding of their communities and problems related to development matters.

- INDISCO encourages its project partners to carryout self-evaluation exercises. Therefore, special guidelines on how to carry out participatory self-evaluation has even been included in this booklet. See Part II, pages 53-75.

2. Independent evaluations

When "outsiders" are asked to assess whether the project is functioning properly, we call it an **independent** evaluation.

Tripartite evaluation

An independent evaluation can be carried out by ILO consultants or can be a **"tripartite evaluation",** i.e., carried out by a group representing the three partners: the executing agency, the donor and the local project partners, including national partners (government agencies concerned).

The partners in the project will agree on the purpose of the evaluation and which specific issues the evaluation team should look into. These and other instructions are written in the **Terms of Reference** (TOR) which are given to the team. The independent evaluation team will probably look into several aspects of project performance and discuss questions which also have been studied by the self-evaluation earlier. It is, therefore, of a great help to the evaluators from outside to have access to the reports from the self-evaluations.

When?

Usually one **mid-term** independent evaluation is performed while the project is being implemented. The purpose is the same as for a self-evaluation, i.e., to enhance the management of the ongoing programme.

The purpose of a **terminal** evaluation at the end of the project period is to analyse and learn from gained experiences and make use of them in a possible extension of the project or in new projects.

Provisions in the project document

The Project Document should include a plan for monitoring and evaluations, stating when and how they should be conducted and when reports should be submitted to the main partners in the project. Remember that all data gathered by the project must be broken down by sex.

Example of an evaluation plan

Monitoring, evaluation and reporting

- The project will maintain *a systematic record of project activities* and their participants including training programmes.
- A *workplan* will be prepared, including dates for completion of each task and persons/units responsible, immediately when the project starts.
- *Annual self-evaluation* exercises will be organised within the project in which the beneficiary group will take part.
- *Progress reports* will be prepared annually by the project management and be presented and discussed with the partner agencies.
- An *independent mid-term evaluation* will be conducted half-way through the third year of the project.
- An *independent final evaluation* may be conducted at the end of the project period.

PART II
PARTICIPATORY SELF-EVALUATION

Introduction

Organizing the work

What will we look at?

Summing up and writing a report

Follow-up action

Introduction

Participation

The ILO/INDISCO programme aims at supporting indigenous and tribal communities in creating better living conditions and achieving self-reliance.

The projects are based on the philosophy that the indigenous groups decide themselves over their own development and the kind of assistance they need.

Some members of the communities have to share the responsibility for project planning and implementation. Others take on the roles as "village animators", as leaders of study groups and trainers of other members, as facilitators and co-ordinators of workshops, as instructors in technical training, etc. Most members of the communities **participate** in one way or other in project activities. This is a condition for success. Participation is the key to development.

Evaluation

Some time during the course of a project, we want to find out if we are on the right track and whether the work has been worthwhile. Have the objectives been achieved? We have to carry out an investigation, an evaluation, to find out the value and usefulness of the project.

Sometimes the donors and ILO/INDISCO will send out people to conduct an evaluation, so that they can learn something for coming projects. But it is, of course, even more important that members of the community participate in an evaluation of their own project. In that way they will

learn from their experiences and prepare themselves for future project work.

Why "participatory self-evaluation"?

There are several reasons why an INDISCO project first of all should be evaluated by the indigenous and tribal peoples themselves:

- The best judges of whether benefits have been produced or not are the indigenous and tribal peoples themselves, who are supposed to share the benefits.
- The members of the community will be able to tell in concrete and vivid terms what the project has meant to them. This makes it easier to appraise the benefits of the project.
- The involvement in the evaluation strengthens the feeling of "ownership" of the project. Interest in the project will thus be maintained.
- When people see that their own ideas and judgements are appreciated there may be a positive change in their attitudes and self-esteem.
- To take part in a self-evaluation exercise also means to learn more about the community and development work in general. The participants will actually increase their competence for leadership in possible future projects.

A workshop

A prerequisite for a self-evaluation is that the people involved are well-prepared so that they can work effectively. It is a good idea to have a workshop for this purpose.

INDISCO strongly supports the idea of participatory self-evaluation exercises and has, therefore, put together the following guidelines. They are based on the experiences of indigenous and tribal project staff and leaders. The guidelines can be used as an outline for a workshop on participatory self-evaluation.

Organizing the work

A self-evaluation team

The best method for a participatory self-evaluation is to let a group do it together as a team. The team should meet several times, and in between they should meet people in the villages, listen to their opinions and get the facts from them. Finally, the team will prepare a report on their findings, including recommendations for the future.

Selection of team members

The project management will ask the indigenous community to select members for the self-evaluation team. There should be at least one representative from each village or from each tribal group, and women should be represented as well.

Village-level meetings will be used for the selection process, and the extension workers will ensure that ordinary members of the tribal groups are selected and **not** just leaders such as village heads, tribal chieftains, presidents and board members of cooperatives, etc.

The team will eventually be composed of the following members:

- The selected indigenous representatives from the villages (men and women).
- One person representing the implementing agency.
- The Project Manager.

Terms of reference

Independent evaluation teams normally receive a "job description" (called the **Terms of Reference**) from

INDISCO and the partner agencies, which specifies what the team should do. It may be good also for a self-evaluation team to have such a job description when they begin their job, and this can be provided through INDISCO. On the other hand, the team should feel free to design its own evaluation programme, based on the Project Document, workplans and progress reports.

Scope and coverage

The self-evaluation should cover **all** the villages that have participated in the project and not only a few selected ones.

Normally, a self-evaluation is needed **once a year**.

All activities undertaken by the project over the last one year period should be evaluated, meaning that whether they were of a good quality or not should be judged. Examples: Training including literacy classes, income-generating activities, revolving loan fund operations, environment protection and natural resource management, cultural preservation, cooperative and small business development, support to traditional livelihood practices, forestry and land-based activities, handicraft development, special programmes for women, youth and so on.

The team may also look at other factors of importance, for example, the overall design of the project and external factors which may have influenced project activities.

Summing up, the following areas should be evaluated:

- **Design** of the project.
- **Implementation** of the activities.
- **Effects and impact** of the work (performance analysis).

In the next chapter we have listed a number of questions related to these matters. The evaluation team will probe the people in the villages for the answers. These questions, we suggest, should be taken not for "guiding" the team members but rather for "inspiring" them in carrying out the participatory self-evaluation work.

Documents needed

The team must have access to the following papers:

- **Project Document**.
- **Workplans** prepared by the project management.
- **Progress Report** prepared by the project management.

If the papers are not available in the local language, the Project Manager will recite the information from these documents whenever required by the team.

Approaches

The team will work in various ways:

- **Team meetings**; discussions within the team.
- Meetings with people in the **villages**.
- Team members talk to villagers **individually**.
- **Consultations** with the implementing agency and local government units.

The basic idea of a participatory self-evaluation is to let all the people participate. That means that the meetings arranged in the villages and the discussions and interviews with individuals are crucial for an effective evaluation.

Assistance from INDISCO project staff

Responsibility for the work and the meetings will have to be taken by the team. The village animators, extension workers and other staff from the project will offer the

following services to the evaluation team:

- Training on self-evaluation techniques and implementation procedures.
- Assisting in arranging village-level meetings for the selection of self-evaluation team members and for the discussion of the evaluation report.
- Assisting in the translation of needed documents into local language, if required.
- Arranging meetings with involved agencies.
- Taking minutes during field investigations.
- Informing the team about technical matters.
- Assisting in the preparation of the self-evaluation report, i.e., formatting, typing, etc.
- Co-ordinating between village groups and the evaluation team, and between the team and the project management.
- Forwarding final reports to concerned agencies and groups.
- Assisting indigenous and tribal communities in carrying out required follow-up action.

The first team meeting

In the first team meeting the work should be planned:

- A list of matters for evaluation is prepared, based on the Project Document (outputs and activities), the workplan and the progress report (see the next chapter, pages 63-68).
- The work distribution is planned. (will all team-members work with all the questions on the list or will there be a division of the work?)
- Responsibilities for village meetings, etc., is determined.
- Procedures and responsibility for the report writing is defined.

- The total programme for the evaluation work is outlined. Dates for coming team meetings and completion of the evaluation work are fixed.

The evaluation work

Some of the questions on pages 63-68 are quite easy to answer; others are much more difficult.

The questions listed under "implementation" are of a "practical" nature. It is suggested that the team members should not limit themselves with these questions. Usually, it is easy to check and assess the practical output from a project, such as number of people trained, sales of produce, etc.

But how can we judge whether the project is useful and effective and if we eventually will achieve the objective of the project? Such questions are listed under the heading "Effects and Impact" on pages 66-68.

An example will illustrate the problem. Assume that under the immediate objective on p. 36 *"At the end of the project, the service capacity and functions of the indigenous cooperative federation will have been strengthened and developed, enabling it to organize savings and credit schemes among the members and to maintain and manage the operations in an effective manner"*, one of the outputs listed in the Project Document is:

"One hundred cooperative committee-members trained on cooperative principles, the cooperative law and meeting techniques."

From the people involved we can easily establish the fact that the training programme has been implemented and also that everybody seems to be happy with it. But it is

much more difficult to find out whether the committee members who have been trained, are actually using their new knowledge to improve and whether the services of the cooperative are better than before because of the training (achievement of immediate objective). To measure whether we have achieved the objectives, we need indicators which are measurable and on which basis it will be much easier to judge whether we are progressing or we have already achieved what we wanted, i.e., our immediate objectives. One good *indicator* would be that the committee members now arrange meetings according to the rules and regulations. So we have to find out this.

In this way the team will first find out the dry facts about a specific objective, its outputs and the activities, using questions related to "Implementation" (see pages 63-66), then continue to analyse the matter deeper by using questions related to "Effects and Impact" (see pages 66-68).

What will we look at?

An evaluation is usually a comprehensive and thorough assessment of **the whole project**, all its **activities** and its **effects and impacts**. The evaluation team has to look at the following matters:

Project design

- Has the contents of the *Project Document* been communicated in the local language to the self-evaluation team?
- Was the project design and formulation done in a *participatory* way, i.e., in full co-operation between INDISCO, the implementing agency and the indigenous and tribal peoples concerned?
- Were women involved?
- Are *the most urgent needs* of the community covered by the project?
- Are the *objectives* stated adequately in the Project Document?
- Are the *outputs*, *activities* and *inputs* stated adequately and clearly in the Project Document? Are they listed in sufficient detail?
- Does the Project Document describe how the project should be implemented with the *participation* of the indigenous and tribal communities concerned?
- Was the project designed with due consideration to the traditional institutions, the *culture* and *practices* of the indigenous and tribal group concerned?

Project implementation

Outputs and activities

With reference to the *outputs* stated in the Project Document and the *activities* listed in the workplan, the evaluation team should assess the progress made in all areas. The following are examples of complementary questions.

Literacy training

- How many women and men have been enrolled in the literacy training organized by the project? How many have "dropped out" from the courses?
- How many men, women and children can now read and write?
- How many men, women and children are using their reading and writing skills and for what purposes?

Cooperative development

- What kind of cooperative training has been organized by the project?
- How many women and men have participated in the different courses? How many have completed the courses?

Revolving loan fund (RLF)

- How many women and men have utilized the RLF?
- What has the RLF Committee been doing? How can its work be further improved?
- How many times has the fund "revolved"?

Income/employment-generating schemes

- What business activities have been promoted for specific groups?
- How many persons (men and women) have attended skills training courses?
- How were traditional jobs restored?

- Who were the local partners in employment generation activities?
- In which sectors have new jobs been created?

Technical training

- Which skill training programmes have been conducted? How many women and men have participated?
- How have women and men been trained in the use of the tools and equipment provided by the project?
- How have male and female trainees benefited from the training? What kind of follow-up action has been taken by them and by the project after training?

Gender equality issues

- What have the project staff done to ensure a gender balance in project activities?
- Have any women-specific training programme and other income-generating activities been undertaken?
- Has gender awareness training been conducted?
- Are women involved in decision-making? Specify.
- What has been the impact of gender-related activities so far?

Environment/Natural resource management

- Which activities have been undertaken to protect the environment?
- How have indigenous knowledge and practices been utilized in this work?
- Have potential conflicts of interest been addressed?

Cultural preservation

- What activities has the project undertaken to preserve the traditional culture of the indigenous groups concerned?

- How many cultural events have been organized during the last one year period? How many women and men participated in these events?
- What kind of traditional handicraft has been promoted and what kind of assistance has been given in this field?

Management and co-ordination

- For which undertakings have workplans been prepared by the project management?
- Which workplans were prepared *in consultation* with the communities?
- How were the communities *informed* about the progress of the project?
- Which activities have been *completed*?
- Which activities are still going on *according to the plans*?
- Which activities have been *delayed*? What are the reasons for the delay from the community's viewpoint?

Inputs

- What materials, tools and other *equipment* have been supplied by the project?
- How many women and men have made use of the new equipment?
- How are tools and other equipment kept?
- Which inputs have been *delayed*?

Effects and impact

Having checked the implementation of the work, carried out by the project, the evaluation team has to make a deeper analysis to determine whether the project is on the right track towards the achievement of the immediate objectives or can do better. The main concerns in this analysis are:

Progress made (Effectiveness)

- To what extent has the project achieved its immediate objectives?
- Which of the indicators of achievement, stated in the Project Document, are still not evident?
- How can the project increase its effectiveness?
- On cooperative development:
  - How has the performance of the cooperative developed? In business figures? In membership figures?
- On revolving loan fund:
  - What benefits have resulted from this?
  - What was the repayment rate during the last one year period?
- On employment/income-generating schemes:
  - How many new and/or additional jobs have been created during the last one year period?
  - Who are the primary beneficiaries (women, men, youth...)?
- On environment and natural resource management:
  - What impact have the activities had on the environment?

Costs and benefits (Efficiency)

- Are the costs of the project justified as compared to the expected results?
- What can be done to increase the efficiency and reduce costs?

Usefulness (Relevance)

- How useful are the effects/outcome of the project? Do they meet the real needs of the people?

Durability (Sustainability)

- What is the likelihood that the benefits will continue after the end of the project?
- Which project effects are not sustainable? And what should be done to increase the livelihood for sustainability?
- Which signs indicate that people are committed to maintain the results and continue to benefit from the activities?

Unanticipated effects

- Which unforeseen positive or negative effects is the project having?
- Which constraints or problems have appeared in the project work and which remedial action has been taken?

Project management

- How do the project staff cope with their jobs?
- How is the co-operation and communication between project staff and the indigenous and tribal peoples going? Is there a need for improvement and, if so, how?
- How can staff performance in general be improved?

Summing up and writing a report

When the self-evaluation team has concluded its work in the villages, it is time to sum up the findings, draw some conclusions about the project and present it all in a written report.

The outline of the report

Here is an example of a possible outline (note that it is similar to the outline of the text in the previous chapter).

Evaluation Report

Table of Contents:

I Summary of Findings-Conclusions and Recommendations

II Introduction

III Project Design

IV Project Implementation
- Outputs and Activities
- Project Management and Co-ordination (including staff performance)
- Inputs

V Effects and Impact
- Progress made
- Costs and benefits
- Usefulness

- Durability
- Unanticipated effects

VI Findings, Conclusions and Recommendations

Chapters III – V will obviously contain the factual information regarding the activities.

When all that information has been collected and written down, it is time to formulate the **findings, conclusions** and **recommendations** for Chapter VI, with a summary in the first chapter as well. This will be done in the final meeting of the evaluation team. Some clarifying examples:

Findings are information or facts, e.g.:

- The repayment rate of revolving loan fund was 95 per cent.
- No women attended the meetings.
- Five storehouses were constructed instead of the planned three.

A **conclusion** is drawn from facts and circumstances, e.g.:

- Two cooperative societies will not be able to provide supply services due to lack of storage facilities.
- The plan for marketing of baskets failed to achieve its objective.
- Transport problems prevent many people in benefiting from the trade store services.

A **recommendation** is a prescription on what should be done, e.g.:

- In the future there should be separate projects for the two regions.
- Women's participation can be increased through a special women-only project.
- The credit rules should be revised.

Validation of the report

The report is based on the opinions of the indigenous and tribal groups concerned so it should not be presented until they have approved it.

Therefore, the people will be invited to finalization/ verification meetings with the evaluation team. The draft report will be presented in the meetings and time given for discussions. The participants should be encouraged to propose additions and amendments.

Separate meetings with women or youth can be held, if this would increase the likelihood of voicing their opinion. The community heads, self-help groups and cooperatives will also review the self-evaluation report separately to check whether their views were included and their needs and priority addressed.

The implementing agency is also invited to comment on the report.

Completing the report

When the evaluation team has incorporated the suggested amendments into the report, it can be published and distributed to all concerned, i.e. the partners in the project.

Follow-up action

Many people contribute in the evaluation work. They do it because they want to strengthen the project and to improve it if possible.

But the work is in vain if nobody makes practical use of the findings and recommendations. The report must therefore be "followed-up." **Action** must be taken on three levels:

- Field work in the indigenous and tribal **community**.
- Management of the **implementing agency.**
- In the **executing agency** (INDISCO).

The indigenous and tribal community

- The village people, extension workers and village animators will now, in the light of the self-evaluation report, review the activities undertaken at the village-level.
- Meetings can be organized with specific groups to discuss experiences from the self-evaluation exercise, alternative approaches, strengths and weaknesses of project implementation, etc.
- The extension workers and village animators, together with community heads and action groups, should use the self-evaluation report as a practical input in the preparation of village-level work plans and projection of specific activities.

The implementing agency

- The project management will take the self-evaluation report into account in overall project planning, implementation and monitoring.

- The Project Manager will revise/update training curricula and programmes for extension workers and village animators in the light of recommendations made by the self-evaluation team.
- Training and re-training of project staff will be directed to meet the needs of the communities highlighted in the evaluation report.
- Recommendations and suggestions made in the evaluation report regarding policy and programme design and/or revision (Project Document, revolving loan fund agreement, etc.) will be taken into account in communication with INDISCO.

The executing agency, INDISCO

- Self-evaluation reports from all projects will be collected and submitted to the donors as part (annex) of regular progress reports.
- Self-evaluation reports will be made available to the members of independent evaluation teams.
- Self-evaluation reports will be circulated to other projects in other countries for experience sharing.
- INDISCO will use self-evaluation reports together with independent evaluation reports in revising/ restructuring the general INDISCO programme as well as separate country projects, implementation guidelines and workplans, and to revise/re-phase budget allocations.
- Self-evaluation reports will be taken into account in assessing the performance and quality of work of the implementing agency. They will also be used as a cross-check on the information received from the implementing agency.
- Self-evaluation reports will also be used as resource material in various other activities, e.g., in designing training guidelines and manuals, in the preparation

of background papers and country/community-based profiles, in initiating projects to meet the changing needs of indigenous and tribal groups, etc.

- Finally, self-evaluation reports will be sent to the government agencies responsible for the development of indigenous and tribal peoples in the programme countries to be used in preparing/ replicating participatory development projects and programmes and in improving the policy environment.

PART III
END-OF-PROJECT PROCEDURES

Introduction

Steps in the withdrawal process

After take-over

Introduction

The purpose of the ILO-INDISCO Programme is to contribute to the efforts of the partner indigenous and tribal communities aimed at achieving self-reliance.

To make the impact of an INDISCO project sustainable and to eventually achieve the development objective, it is very important that the indigenous and tribal community continues the development work after the end of the project period. An agreement is therefore reached between INDISCO, the implementing agency, other local organizations and the community on how the phasing-out of INDISCO will be organized.

This outline, once finalized in consultation with INDISCO partners, describes how INDISCO and the implementing agency will gradually reduce their active involvement in a project and how the planning of the final take-over will be done.

Steps in the withdrawal process

1. Special provisions in the annual workplan

The workplan for the final year will include, in addition to the regular project activities, the following provisions:

- A schedule for the withdrawal process.
- A schedule for community consultations regarding the withdrawal.
- Identification of community-based organization(s) and/or their representative bodies to take over project responsibilities.
- Selection of major components which would strengthen the capacities of grassroot organizations.
- Preparation of a list of equipment obtained from the project.
- Preparation of a detailed financial statement of Revolving Loan Funds, including a balance sheet.
- Preparation and submission of a final report (before withdrawal) which will include recommendations for the post-project period.

2. Consultations on the role of the community

As all project activities are designed, implemented and evaluated with the participation of indigenous and tribal communities, the phasing-out process will also be designed and put into practice in the same way. The implementing host agency will organise a series of community consultations to explain that the external support from INDISCO will be withdrawn by the end of the present phase, in a step-by-step manner, and the communities will take over the full responsibility for the continuation of their project, if they so decide. The following subject matters may

be discussed in these community consultations:

- What will be the role of community members and community organizations, including traditional institutions, during and after this transition period?
- Which project components will be in focus during this transition?
- How many of the project staff will be kept on to continue serving the community?
- Are there management weaknesses in the community organizations (cooperatives, other associations), and what will the implementing agency do to strengthen these organizations during the transition and beyond?
- How will the project equipment be collectively used and maintained?
- How can Revolving Loan Funds be turned into sustainable community credit institutions with the incorporation of community savings?
- Is there a need for a secondary structure(s) of community organizations (co-operative union, federation, etc.)?
- How will basic social services be maintained and the Government inputs sustained?

3. Focus on selected components

After community consultations, the implementing organization, together with the project staff, will revise the project workplan, putting more emphasis on some selected project components, which are considered to be important in improving the project management capacities of the community-level organizations. The ILO's Multi-disciplinary Team (MDT) and INDISCO will provide additional technical support in carrying out special capacity-building activities, if required.

After consultation with the community organizations, the implementing organization will identify the most needed training programmes; the selection should not be limited by the following list of examples:

- Management training for the leaders of community organizations.
- Institutional strengthening of community-based credit institutions.
- Staff training on financial management, book-keeping and accounting.
- Co-operative management and member education.
- Planning, monitoring and evaluation techniques.
- Methods to collect, analyse and incorporate indigenous knowledge into a project.
- Gender analysis and gender planning.
- Environmental impact assessment techniques.
- Community organization and social service delivery mechanisms.
- Vocational training in emerging sectors in tribal context.
- Land and natural resource management.

4. Gradual withdrawal from day-to-day operations

When the implementing agency is going to complete its main job as the **implementing** partner in the project, it will gradually withdraw its support from the day-to-day operations of the project and leave the responsibility to other groups and organizations. This will be extended to cover, gradually, more and more components of the project in all project villages. The implementing agency will, however, continue to oversee, and when necessary, take part in implementing and monitoring certain project activities. The project staff will particularly assist the

community organizations in conducting daily operations during this transition period.

Which major activities should first be taken over by the community? This will be decided through intensive consultations of the project staff with the community leaders. The self-evaluation reports will also be used in identifying the operations "... operations from which the project first can withdraw from."

5. Strengthening community-based organizations

Local organizations play an important role in safeguarding traditional knowledge and practices and "making" practical use of these in the development process. For this reason, the implementing agency will put particular emphasis on strengthening local organizations to make them ready to take over some of the project responsibilities.

Community-level organizations which will receive direct support from the implementing agency during this transition period are, for instance:

- Indigenous and tribal peoples' cooperatives.
- Cooperative apex organizations (unions).
- Village development committees.
- Tribal organizations and/or federations.
- Indigenous and tribal women's organizations.
- Self-help groups and associations.

6. Official taking-over ceremony

Towards the end of the transition period, the implementing agency will organise a public and official taking-over ceremony with the participation of all involved in the project including ILO and government representatives. INDISCO will also invite major donors to participate in the ceremony.

The programme for the official ceremony will be prepared in cooperation with the communities and their organizations. The main purpose is to make it known to the population as a whole that the time has come to continue and intensify the work towards full self-reliance without external intervention.

A main point on the programme will be the signing of the document that covers the commitments and responsibilities of the community organizations in the future. A possible follow-up support, still to be provided by the former implementing agency and INDISCO, may also be included in the document.

After take-over

Responsibilities of community organizations

The community organizations will prepare, in consultation with the former implementing agency, a draft workplan for the initial one year period after take-over, which will include, among others, economic and social activities to be undertaken by themselves. The community organizations will also indicate how they will maintain and operate Revolving Loan Funds and equipment. Areas in which continued support from the former implementing agency are still needed, will also be specified.

Role of the implementing agency

As far as possible the implementing agency and the ILO-INDISCO Programme should continue assisting indigenous and tribal peoples' community organizations in managing their own development after they have taken over the projects.

The implementing agency will, of course, cease to play the role of an "implementing agency" for the project but will return instead to its former activities and functions. It may, however, wish to establish new links to other government or donor-funded projects and continue giving support to development work.

Where the implementing agency has a long-standing and strong working relationship with the local indigenous community, it is assumed that this relation will remain intact after the termination of the INDISCO project. It is up to the agency itself to decide on which level their assistance will continue after the take-over.

Role of INAC

The INDISCO partners have established national committees called INAC (INDISCO National Advisory Committee) aimed at bringing together the project partners with government agencies concerned to discuss project results, lessons learned and how these results could be used in improving policies and programmes about indigenous and tribal peoples' development in the country concerned.

INAC is expected in the long run, to become a platform where indigenous and tribal peoples' representatives can meet and discuss issues with government and NGOs without INDISCO's involvement. The role of INAC will therefore be to improve the national policy on indigenous and tribal peoples and to establish and strengthen policy dialogue between government and indigenous and tribal peoples. This will create a more conducive environment for the country in question to ratify and implement ILO Convention No. 169.

Role of INDISCO

INDISCO's role will be limited to interventions in specific areas and will be provided through the former implementing agency. The ILO Office and the ILO MDT in the country concerned will continue offering assistance in improving the community organizations' relations with the government and establishing and maintaining direct working relations with interested donors.

INDISCO will continue to stay in touch with the former project communities to disseminate experience and establish linkages between them and other indigenous peoples. The community organizations will take care of the contacts with INDISCO during the post-project period.

Joint evaluation after one year

One year after the end of the project there will be a final evaluation again to assess the effects of the project. This will be initiated by INDISCO and organized by the former partners in the project. The terms of reference for this exercise will be drafted by INDISCO and sent to the former implementing agency for finalization. The latter will accordingly inform the community organizations about this evaluation and ask for their approval. The date will be fixed in agreement with the community organizations.

The purpose of the evaluation is generally to learn from the experiences of the project and particularly to identify weaknesses and potentials in areas in which the project previously was active. A set of recommendations will be forwarded to the community for consideration.

The recommendations may lead to discussions between the indigenous community, local organizations, the government, ILO/INDISCO and other partners, on the needs and possibilities for joint development activities in the future.

ANNEXURES

1. **Gender analysis and planning**

2. **INDISCO and other relevant ILO Publications**

Gender analysis and planning

The term "gender" refers to the socially determined differences between women and men as opposed to the biologically determined differences. These differences vary widely within and between cultures and can change over time. Gender is used as a tool to examine the role, responsibilities, constraints, opportunities and needs of women and men in any context. This is because gender roles and needs are affected by class, age, race, ethnicity, culture and religion, and the geographical, economical and political environment.

The aim of *gender analysis and planning* is to examine the roles and needs of women and men in a society or community and to identify the specific needs and strengths of each. This method is applied in the planning, management, implementation and evaluation of programmes in order to ensure the equal participation of men and women according to their identified needs, special skills and potentials.

Gender analysis is usually the first step in planning a programme or project because attitudes, prejudices and assumptions about women's roles are stumbling blocks to the promotion of gender equality.

Gender analysis requires the identification of:

- ***The division of labour between men and women***
  Who is responsible for which tasks by gender and by age? Is time available to men and women for

income-generating activities? Are there imbalances in women's and men's workload?

- ***Access and control over resources and benefits***
  What resources are required for the productive activities and who controls these resources? To what extent does this affect the ability to increase productivity? Who takes care of the household income and financial responsibilities? Are there imbalances in the remuneration for women's and men's labour?
- ***The different needs of men and women***
  Differentiate between (i) *practical gender needs* or basic needs, i.e. those needs which are usually associated with women's roles as mothers and homemakers, and (ii) *strategic gender needs* which are the needs identified to overcome the subordinate position of women to men in society. In many cases, addressing basic need (such as improving food and water supply and health care) must be given first priority in order to ameliorate the socio-economic conditions of the community concerned. However, addressing only the basic needs and not strategic needs (such as women's access to training, education, credit, land, etc.) tends to perpetuate women's subordinate position in society.
- ***What are the constraints and/or opportunities?***
  What are the differences between men and women's constraints to participation in project activities? Constraints can be due to existing norms and values, legal/institutional barriers, heavy work load, lack of education and training, etc.

- ***What is the capacity of the project partners organizations to promote equality between men and women in employment?***
  Is there a concern or commitment to promoting gender equality? Is there an organizational structure that can address women's issues? Have the partners been sensitized to gender issues?

INDISCO and other relevant ILO Publications

Guidelines

1. Guidelines for Extension Workers: The Way We Work with Indigenous and Tribal Peoples – Geneva, 1996.
2. Guidelines for Extension Workers: Understanding Tribal Life and Culture in India – Geneva, 1996.
3. Guidelines for Extension Workers: Natural Resource Management in India – Geneva, 1996.
4. Guidelines for Extension Workers: The way we deal with credit and savings – Geneva, 1997.
5. "Our Project": Participatory Project Planning and Evaluation for and by Indigenous and Tribal Peoples, Geneva, 2001.
6. Integrating Indigenous Knowledge in Project Planning and Implementation – partnership publication of ILO, CIDA, World Bank and KIVU Nature Inc.

Case Studies

1. Case Study No. 1: Marginalized by Development: Indigenous Women of the Cordilleras – Geneva, 1994.
2. Case Study No. 2: On the Road to Self-Reliance: A Story of the Tribal Women of Durgapur Village – Geneva, 1995.
3. Case Study No. 3: The Way We Live: Indigenous practices of the Ifugaos, Atis and Badjaos of the Philippines – Geneva, 1996.

4. Case Study No. 4: "Once We Were Hunters": Stories of the Bantangans of Mindoro, Philippines – Geneva, 1997.
5. Case Study No. 5: Working Together for a Better Future: Tribal communities in Gujarat, working together with Sadguru and the ILO-INDISCO Programme — New Delhi, 2000.
6. Case Study No. 6: "We Created Jobs...": Tribal communities in Orissa, working together with SSADRI and The ILO-INDISCO Programme — New Delhi, 2000.

Self-evaluation Reports

1. "We Evaluate": INDISCO partner and tribal communities evaluate their own development projects in India and the Philippines — Geneva, 1996/1998, and in Vietnam and Thailand, Geneva, 2000.
2. INDISCO – India: Testing Alternative Approaches to Tribal Development, Terminal Evaluation Report — Geneva, June 1999.

Technical Reports

1. Indigenous Peoples' Cooperatives: Suitable Legal and Policy Framework Baguio City — 6-10 March, 1995.
2. INDISCO Technical Review Meeting, 13-16 December, 1994, Chaing Mai, Thailand, INDISCO Pilot Projects after 6 Months: initial results and future plans of 8 pilot projects for tribal development in India and the Philippines – Geneva, 1995.
3. INDISCO Second Technical Consultation and Planning Meeting, Geneva, 24-28 July, 1995 – Geneva, 1995.

4. INDISCO Discussion Paper No. 1: Indigenous and Tribal Peoples in West Africa, An INDISCO Survey of Selected Groups in Nigeria, Ghana, Burkina Faso and Cameroon — Geneva, 1996.
5. INDISCO Donor Consultation and Planning Workshop, New Delhi, 4-8 November, 1998 — Geneva, 1999.
6. INDISCO Donor Consultation and Planning Workshop, Davao City, the Philippines, 4-8 November, 1998, theme: "Incorporating Indigenous Knowledge into the Development Process" — Geneva, 1999.
7. Possible Structures for Micro Finance Systems for Indigenous Peoples, Proceedings from an ILO-INDISCO Workshop on — Revolving Loan Funds— Geneva, April, 2000.

Other Relevant ILO Publications

1. Tribal People in India, ILO Geneva, 1992.
2. Indigenous and Tribal Peoples and the ILO – Geneva, 1994.
3. Design, Monitoring and Evaluation of Technical Cooperation Programmes and Projects, A training manual – Geneva, 1995.
4. The Philippines, Participatory Development Framework for Indigenous Peoples – TSS1 Report (Second edition) – Geneva, 1996.
5. ILO Gender Issues in Cooperatives: An ILO-ICA Perspective, Geneva, 1996.
6. Effective Negotiation by Indigenous Peoples: An Action Guide with Special Reference to North America, Geneva, 1997.
7. Convention on Indigenous and Tribal Peoples, 1989 (No. 169), A Manual, Project to Promote ILO Policy on Indigenous and Tribal Peoples – Geneva, 2000.

8. Traditional Occupations of Indigenous and Tribal Peoples: Emerging Trends, Project to Promote ILO Policy on Indigenous and Tribal Peoples – Geneva, 2000.
9. Laos: Policy Study on Ethnic Minority Issue in Rural Development (Project to Promote ILO Policy on Indigenous and Tribal Peoples), Geneva, 2000.

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Visit the ILO @s Central Evaluation Unit at:
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INDISCO

ILO's Partnership with Indigenous and Tribal Peoples

The estimated 300 million indigenous and tribal peoples (ITPs) belong to the most marginalized and impoverished communities of the world. Different from mainstream society in terms of their livelihood strategies, languages and relationships to their environments, these communities face distinct development challenges.

ILO Convention No. 107 (1957) and Convention No. 169 (1989) are the only two legal instruments concerning the rights of ITPs within the UN system.

The INDISCO programme is designed to support ITPs and their organizations in implementing their own development plans and initiatives. The INDISCO strategy includes supporting demonstrative pilot projects, promoting best practices and linking grassroots experiences with the broader policy environment.

The INDISCO Programme, funded by a group of donors including DANIDA, the Netherlands, CIDA, AGFUND, UNDP, UNV, WFP and Rabobank, has since 1994 managed a portfolio of country projects facilitating community-based development initiatives among ITPs in South and Southeast Asia (India, Laos, the Philippines, Thailand and Vietnam), Africa (Central Africa, Namibia and Tanzania) and Central America (Belize). It has had a considerable impact in terms of creating sustainable livelihoods, viable grassroots organizations and decent employment.

In order to build capacity of indigenous and tribal peoples' organizations, their leaders and staff, INDISCO has developed a series of guidelines, which have been tested and finalized by project partners. This latest INDISCO publication, *Our Project*, is the fifth in the series and deals with the procedures of participatory project planning, implementation, evaluation and phasing-out.

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