

Meta Analysis – final report

Evaluation of the programmes Education, Basic Needs and Job and Income of Woord en Daad (2004/05 – 2007/08)



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Woord en Daad's Preface and Response

This is the report of the meta-evaluation of Woord en Daad's programmes. This preface presents Woord en Daad's brief response on this report.

Woord en Daad's evaluation policy uses the metaphor of a pyramid: monitoring data at the basis are used for project evaluations at the centre and these are used for programme evaluations at the top. This meta-evaluation combines different 'tops of the pyramids' in order to draw more strategic conclusions above the level of a single program and to lead to a further level of learning: third stroke learning or development.

This meta evaluation is built on the basis of the programme evaluations Education, Basic Needs and Job and Income.

The process of this meta evaluation has been very interactive and iterative. Especially at the final stages, there have been intensive interactions between the consultant for the meta evaluation, the respective consultants for the three programme evaluations, Woord en Daad staff and the partners, during the partner conference in March / April 2009 in Nairobi, where all these stakeholders were present. Having all these stakeholders present during several days has been the best possible environment for going through conclusions from evaluations together and formulating new strategies and policies for the future.

The reports of the three programme evaluations contain elaborate and specific responses on all conclusions and recommendations. This meta evaluation report does not contain such concrete and specific recommendations and therefore, a similar elaborate response is not needed.

One major new development that took place, partly based on the outcomes of the meta evaluation is the transformation of the Woord and Daad 'chain approach' into a more comprehensive 'theory of change'. A second major development is the transformation of the partnership model between Woord en Daad and partners into a model of regional alliances where Woord en Daad and partners cooperate. These two major changes are still under further development. These two major developments are a basis for the policy plan 2011 – 2015. Reference is made to this policy document for further explanation of these changes.

Apart from these two major developments, the meta evaluation has also given inputs for developing a new policy for Planning, Monitoring, Evaluation and Learning, for the further development of the role of context analyses and for the policy development of the three programmes.

As C.E.O. I want to acknowledge the efforts of the consultants as well as the staff of Woord en Daad and partners, who together helped to realise this result.

Jan Lock MSc
C.E.O. Woord en Daad

Author's Preface

The Foundation Woord en Daad which has commissioned this work, is a Protestant Christian organisation, working in international development cooperation on three continents in more than 20 countries since 1973. The foundation is based in the Netherlands (Gorinchem). Woord en Daad is a co-financing organisation, it funds 'projects' of its partner organisations (POs) with whom a long term collaboration has been established by way of a partnership agreement. In 2008 Woord en Daad supported 54 partners: 23 in Africa, 19 in Asia, 9 in Latin America and some in the Balkan (for economic projects only, through the Dutch partner organisation Dorcas).

In 2008, Woord en Daad spent a total amount of approximately € 21 million on the activities of its partners – € 12 million of that amount was spent on Education, the biggest of the three programmes Woord en Daad is sponsoring. The other programmes are the Job and Income Programme and the Basic Needs Programme¹. A fourth programme, Emergency Relief and Rehabilitation, has recently been merged with the Basic Needs Programme.

In the Netherlands, Woord en Daad has an active policy of fundraising (private funds and public funds). Woord en Daad's income is received from private donors (48%), enterprises (12%) and institutional donors (39%)². In 2007, the total income was € 26,9 million. The Dutch government is Woord en Daad's biggest institutional donor. In 2007 Woord en Daad received € 5,6 million (TMF/MFS) from the Dutch Ministry of Foreign Affairs in the form of International Cooperation grants.

Woord en Daad collaborates with Dutch and some European partner organisations, which are either other non-government organisations, business enterprises, schools, universities; it also works with a big number of volunteers. Woord en Daad is active in the branch organisation Partos.

In 2006, Woord en Daad reformulated its monitoring and evaluation policy. The policy is based on three steps, from the base of a pyramid where regular monitoring data and informal knowledge are collected by partner organisations, to a middle layer where project evaluations by independent local consultants take place, to a top layer where programme evaluations are done by international consultants (cf footnote 3 below). The first time programme evaluations took place, a final meta-level was added spanning the summits of three pyramids representing programme evaluations.

In 2007, the Emergency Assistance programme was evaluated and in 2008/2009 the Education programme was evaluated. In 2009, the two other Woord en Daad programmes, Job and Income and Basic Needs, were being evaluated together. The so called Meta-analysis (the present document) forms part of that joint evaluation, and also covers the Education programme evaluation.

The evaluations are preceding the formulation, in 2009, of the new Woord en Daad policy framework for 2011-2014, which will also be used for the request for MFS subsidy for the

¹ Per programme, the following amounts were spent during four years: Education (2004-2007): € 46 million; Job&Income (2005-2008): € 20,6 million; Basic Needs (2005-2008): 10,8 million

² Figures 2007, Jaarverslag 2007.

same period. As a first major input for this policy formulation process, a global partner conference was held from March 25 to April 1, 2009. In order for all three programme evaluations to be able to serve as inputs for policy formulation, it was decided to start these evaluations earlier than planned so that the major conclusions could be presented during the partner conference. During this partner conference the evaluation conclusions were validated by all partners of Woord en Daad.

Of the three programmes, the *Education programme* was evaluated first. It was carried out by COMMON – Mr. Jenze Fokkema, and Van 't Rood Educational Services – Rogier Van 't Rood.

Both the Job and Income and the Basic Needs programme evaluations and the Meta analysis were done in conjunction with each other, by a joint team of MDF and ETC Crystal, but on the basis of different Terms of Reference.

The *Basic Needs programme* evaluation was carried out by ETC-Crystal – Joanne Harnmeijer. The *Job & Income programme* evaluation was carried out by MDF- Frans van Gerwen. The *Meta-analysis* was written under the supervision of MDF – by Sjoerd Zanen.

The MDF-ETC Crystal team has jointly prepared an Inception report (November 2008). A specific feature of these programme evaluations was that they did not include field research: research and analysis were done on the basis of W&D documentation, interviews with W&D staff and telephonic interviews with partner organisations. In order to be able to read whatever document the evaluation team wanted to see, W&D gave the team access to their electronic data-base. The consultants are grateful for the trust that was put to them. Some comments on a summary of the (draft-)reports were obtained from the POs and from W&D staff during the partner conference in March 2009 in Nairobi which the evaluators attended. These comments have been taken into consideration in the final report(s).

The facts that the evaluations were mainly done on the basis of written material, and that POs could not be visited, have produced a bias in the evaluations. A second bias was caused by the fact that research was done on the basis of a sample. What is quite unique is that the draft reports of all three evaluations were validated in a sophisticated way by all the POs present during the partner conference. The evaluation results are especially a message for the partner organisations, as it appeared during the Nairobi conference that many of the points mentioned had meanwhile be included (by Woord en Daad) in discussion documents for the conference.

Although the evaluators went through an enormous number of W&D documents of all kind, they were not asked to assess W&D as a whole, their philosophy, and all their operations. Their assignment was only to evaluate the three mentioned programmes, and to do so with the help of the questions in the respective ToRs. This meta-analysis, however, does transcend the programme-evaluations, and takes a helicopter view of the Woord en Daad organisation.

The Terms of Reference (ToR) and the Methodology of the three programme evaluations can be found in the annexes of the respective evaluation reports.

1. Introduction: learning should take place

The evaluations of the Woord & Daad programmes Education, Job and Income and Basic Needs are to serve learning purposes in the first place. Using the outcome of the evaluations, learning should take place at the policy level as well as on the implementation level of all programmes. This learning, by Woord & Daad and its partners, should lead to further development of *policies* for the programmes, and should also lead to *innovation* and *improvement* of programmes and projects on implementation level.

Such was the main objective of the programme evaluation *process* as this process was explained in Woord & Daad's evaluation policy³ and as this process was undertaken in 2008-2009. It was also stated in the ToR of all concerned evaluations.

But this evaluation process also contained a novelty not mentioned in Woord & Daad's evaluation policy. The evaluation of the three programmes (Education, Job and Income and Basic Needs) was to be complemented by a so-called Meta-analysis. "Meta" literally means besides, behind or above, so a meta-analysis looks for principles or inspiration that guides all. The objective of this meta-analysis is to compare the three individual evaluations' key findings, to see which conclusions are commonly shared and which are not, to draw conclusions which transcend the individual programmes and to provide even deeper insight (what is 'behind' or 'above') W&D policies and practices. Thus, from project level through programme level to meta-level, a progressive insight in the organisation and its practices is obtained, which results in lessons of varying degrees of abstraction.

Initial W&D suggestions for subjects to be treated in the meta-analysis⁴ concerned the relevance of W&D's partner policy and the relevance of the W&D chain-approach. In the following report both issues will be touched upon, but in choosing issues, we will follow the taxonomy of the other evaluations with their four distinct levels of analysis: Implementation by the partner organisations, Implementation by Woord en Daad, Woord en Daad relations with partner organisations, and Woord en Daad policies.

³ In this policy, the analogy of a pyramid is used in which the base is formed by regular monitoring systems and informal knowledge of partner organisations and project officers. The middle layer of the pyramid is formed by *project* evaluations, carried out by partner organisations in collaboration with Woord en Daad. The top of the pyramid is formed by programme evaluations at the level of the three distinct programmes of Woord en Daad: Education, Job and Income, and Basic Needs. Every year, one of the programmes will be evaluated so that every programme is evaluated once every four years. It is assumed that there will be sufficient project evaluations available before a programme evaluation is carried out to serve as building blocks for the programme evaluation.

⁴ For this meta-analysis no ToR was made. It was asked to the consultants to propose questions in their Inception-report, which they did.

2. Levels of learning - methodology

Woord en Daad repeatedly expresses the wish and vocation to be a learning organisation. Several times they have used a well-known model to explain what they mean by organisational learning⁵, see Figure 1.

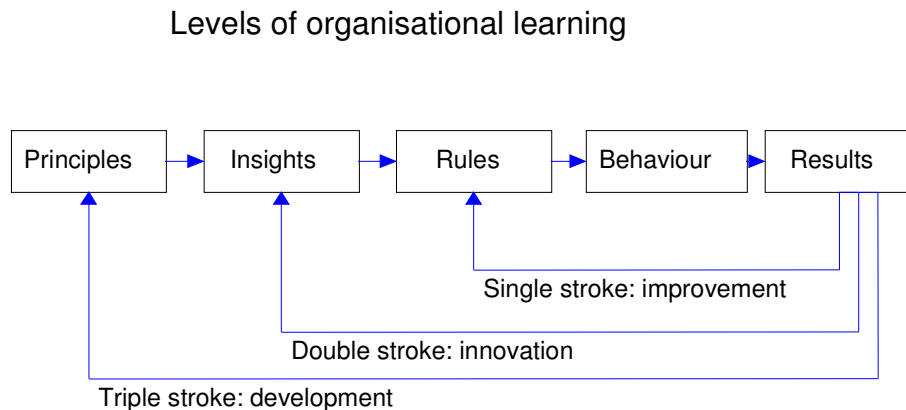


Figure 1

In an organisation *single stroke* learning takes place if collective learning leads to change in existing rules, agreements about cooperation, procedures. This may take place daily, weekly or monthly. This learning is steered by ‘how’ questions (not ‘why’ questions). Its key-word is *improvement*.

Double stroke learning takes place if the staff learns on insight level, on the level of knowing and understanding. This learning may take more than ten months. It is steered by the ‘why’ question: arguments, theories, opinions about the ‘why’. Its key word is *innovation*, innovation of insights within current principles.

Triple stroke learning is concerned with new principles or a new mission. What organisation do we want to be? To what should it lead? Which value do we consider important? This learning usually happens in 7-10 year cycles, when reflection on fundamental ‘want’ questions takes place. Its key word is *development*, the development of new principles with which an organisation may shift to a next phase.

Interestingly, in a recent W&D-paper⁶ proposing a framework for planning, monitoring, evaluation and learning (to be further elaborated for MFS II), the same learning strokes are presented. What in the above figure is called Results, is in the framework worked out in the common DAC result-categories Outputs, Outcomes and Impacts.

⁵ Cf Algyris, C. and Donald Schön, *Organizational Learning*. Addison-Wesley, London 1978. Woord en Daad also wrote a discussion paper (Role of learning and innovation in the organization) for the Nairobi conference, in which they refer to Britton (2005), *Organisational Learning in NGO's: Creating the Motive, Means and Opportunity* (Praxis paper 3 Intrac). In 2006, Woord en Daad created a department (Advice and Research) in order to stimulate learning in the organisation.

⁶ Wouter Rijneveld: *Nieuwe wegen in Planning, Monitoring, Evaluatie en Leren in IS* (paper, 12-12-2008).

- The *single learning stroke* (or *loop*), from Output-level backwards is characterized by the question: *Do we do things well?* – to be found out by monitoring on Output-level.
- The *double learning stroke*, from Outcome-level backwards is characterized by the question: *Do we do the right things?* – to be found out by monitoring on Outcome-level/programme evaluations.
- The *triple learning stroke*, from Impact-level backwards is characterized by the question: *Is our theory of change correct? What is development?* – to be found out by conducting impact studies.

In fact, the questions mentioned above correspond with the questions which are usually asked when considering (of a project, a programme or a policy) respectively its *Efficiency*, its *Effectiveness* and its *Impact*. The challenge of this Meta-analysis is to transcend the three individual programmes, and to consider for the W&D programme approach in general the efficiency, the effectiveness and the impact on each of the four levels which W&D has chosen as the units of analysis: *implementation by the partner organisations*; *implementation by Woord en Daad*; *Woord en Daad relations with partner organisations*; and *Woord en Daad policies*.

3. Implementation by the partner organisations (PO)

Some characteristics of Partner organisations

Most Woord en Daad's POs are generalistic organisations, not specialised either in education, health or economic activities. In most of the cases they do not dispose of specialists in the above mentioned fields. Neither do they entertain explicit or regular contacts with specialised institutions in their respective countries. POs have not been selected by W&D on the basis of their specialist knowledge or capacities (only so called *network partners* have been chosen on that basis). What they do determines their identity. New initiatives are usually inspired by the suffering of the poor whom they want to take care of out of compassion and Christian responsibility. As much as possible programmes have been set up which combine education, job and income and "basic needs".

POs and their leaders are inspired by Protestant Christian values. Often, the leader has a background, either in religious studies or in practical pastoral work, and often he or she is greatly respected. Both leaders and their organisations show enormous commitment to their mission. They know their people and their context well, and they know well how to attract them. The organisations are closely related to churches, although they do not coincide. The leaders have practically built up their organisation either alone, or with gradually increasing support by W&D⁷. This gave them an opportunity to modernize and professionalise, and also to specialise to a certain degree.

More than half of the POs are small and relatively young organisations, with a small volume and range of activities, a limited number of managing and coordinating staff and hardly specialised staff, and a restricted overall budget. Even if they function well qualitatively, they can hardly be expected to have a significant impact on any sector in their country.

The larger POs dispose of more staff, more outreach, in some cases specialised staff, and a considerable budget. Increasing their size is seen as a strategy to gain more influence in general, and in the (Christian) community. All POs are formally recognized by their governments.

3.1 EFFICIENCY: DO WE DO THINGS WELL?

Project planning and implementation

The project documents indicate that, generally, and in increasing degree, the partner organisations (POs) of Woord en Daad carry out the projects according to plan and according to agreed budgets and time limits (efficiently). Targets, beforehand often specified with indicators, are usually but not always reached. From the documents it becomes also clear that most POs seem to have grasped the principles of result-based planning and monitoring (which does not mean that all is implemented perfectly). They have also recently adopted strategic multi-annual planning (SMAP), which allows for the replacement of a project- by a more long-term programme-approach. Presently, project proposals are still of varying quality, and so are reports and the use of indicators. Big POs score better than small POs in this respect.

⁷ Financial assistance for capacity development has been obtained through PSO.

Project identification

Projects have perceived needs as their starting point. However, a specific context-analysis, an elaborate needs-assessment or a complete problem-analysis is usually lacking in project identification (perhaps they were done long ago?), or at least no proof is found of them in the documents. The rationale for the projects is therefore not fully explained. Needs are generally identified and defined by the PO itself, and certain projects are rather 'supply oriented' where this should not be the case. Relevance is often phrased in terms of a certain problem, with the project being the solution, but it is only rarely convincingly argued that the solution will be both necessary and sufficient for the problem at hand. This may be a point to be taken up in the appraisal by Woord en Daad (cf p.14, under Project Cycle Management).

Relevance and ownership

In general, the activities of the projects (Education, Job & Income, Basic Needs) are very relevant for the target groups.

The choice of beneficiaries is not always transparent, and is often steered by an informal referential system through local authorities or influential persons in the area or in the PO. Clear criteria still lack, although the typical target groups are, consistently, the poorer categories of the population.

It is unclear to what degree families and communities of target-persons are involved in the project activities – there are for instance indications that, in some cases, parents feel little ownership towards the organisation of the education of their children, or in the organisation of community healthcare. Many projects do not seem to be owned by relevant actors but rather by the PO itself. On official level, POs strive for government recognition of their institutions (schools, TVET, health centres) and their curriculae, and certification where that is relevant.

Efficiency

Financial efficiency is hard to measure with the evaluation methodology used (track records, year reports, partner files, interviews). Where it was attempted, a favourable development was found, such as the cost-effectiveness development of the VET programme which is positive – the total annual cost per student is expected to stabilize between 700 and 750 €. It is likely that the efficiency in projects supported by W&D improves, some of the reasons being that more experience is built up by POs, that investment costs (e.g. for schools or centres) decrease over time, and that W&D staff pays attention to efficiency in various programmes, and discusses this with the POs. Overall improvement of efficiency in programmes can only be measured if standards or benchmarks have been determined – this counts for several J&I sub-programmes and for Basic Needs. On the other hand, the clear set of procedures available and indeed used during identification-formulation and control minimises the risk of inefficiency.

Capacity and quality

The capacity of most projects has increased over time which can be read in tables with activities and results. In all but some programme-components one sees numbers and figures (expenditures) increase over the years 2005-2008.

The quality of implementation and service delivery by POs is not well documented. In the Education-evaluation report it is remarked: "... performance varies between extremes of some POs performing well and doing so in almost all respects, to other POs not performing well at all and doing not so in every respect". Project evaluations are still few in number, and when they are critical of PO performance it does not appear in the project documentation how the evaluations are followed up by the POs. In most evaluations the PO organisation is hardly subjected to evaluation.

The professionalism of a number of POs is questionable. In several cases (Basic Needs programme) projects are considered relevant, but the question is asked whether the project design is appropriate or according to the state of the art in the sector. POs work much on their own, and develop few structured and strategic alliances in professional fields. Most of the POs lack specialists in their organisation, nor do they have sufficient functional links with professional organisations or branch networks. In the (S)MED programmes W&D is opting for the establishment of relationships with specialized and experienced organisations in the field of the provision of funds to (small and medium) enterprises. Most of such partnerships with specialized institutions are of recent date.

Often there is no evidence that the interventions have been conceived, designed and implemented on the basis of relevant best practices – for example by copying other, well-performing standards - and neither are best practices systematically remarked and publicised. In the Basic Needs programme evaluation it is stated: "... there is no evidence (in the sample) of '*intentional complementarity*' with endeavours of other actors. Likewise, there is only rarely evidence (at least: in the documents) of a drive to arrive at models of best practice ..."⁸. Quite a few organisations are labelled as 'traditional' or 'habitual' in approach (which do more of the same over a long period of time) and in many organisations 'learning' and 'innovation' are not spontaneous processes. This used to be the situation in a number of primary schools and TVET where curricula were termed as 'traditional' and 'supply oriented' and 'standard'. But at the same time certain POs have been open to expert opinions in certain cases and have accepted expert advice (such as in the case of community based health insurance, in Bangladesh) and are putting lessons learned from other POs into practice. Also, some POs have reacted favourably to shifts in programmatic emphasis by W&D. Since it seems to lead to innovation, this is probably the reason why in the Education programme evaluation it is recommended to W&D to steer, not only on project criteria but also on content matter, to fix standards, norms, criteria, requirements and thresholds. The message is: more *double loop* learning is required.

Sustainability

Woord en Daad is in the process to further develop and apply the concept of sustainability. In the Draft policy plan 2011-2014, *sustainability for Woord en Daad involves establishing development interventions in such a way that the development constituency is increasingly able to contextualize, adapt and maintain their 'self-responsibility' in a resilient manner*. In the operationalization of sustainability four dimensions are differentiated: economic, social, environmental and institutional. In

⁸ The lack of search for models of best practice (Basic Needs programme) is attributed by the evaluators to "a lack of external nourishment by authoritative knowledge".

applying these dimensions to the activities, the reflection is focused on participation, ownership, capacity building, using local knowledge and skills, recognizing external influences, etc. These various building blocks may come together in the strategic plan (SMAP) “which is in turn focused on promoting and sustaining self-responsible stewards in His Creation”.

According to all three evaluators, insufficient provisions are created for post-project funding, in spite of asking fees to those who can afford, of sales of produce of trainees and fees paid by enterprises. Most POs depend on donors (on W&D in particular) for almost 100%. Continuity of activities (such as sponsorships) and running and maintaining infrastructures, facilities, schools, care-centres etc. is mainly based on the assumption of continued external funding by W&D (or other donors). The financial self-sustainability of TVET centres is around 13% (2007). It should be tried harder to mobilize financial support by embedding the schools in larger societal contexts, and to lobby for government support or for support by the business community.

The financial sustainability issue has to be addressed better by Woord en Daad and its partners⁹. It has been heard in W&D circles that schools and other facilities are not considered a development goal as such, but as a means to facilitate personal development leading to the development of the society; it is thought to be justified to fund such means as long as necessary and as long as possible. This point of view (which remains implicit in Woord en Daad) has to be respected, but others in the International Cooperation-sector think differently, namely that continued dependency on foreign donor funds is not a healthy practical and moral condition for whatever institution in developing countries¹⁰. This is in marked contrast to what some POs define as sustainability, linking it to (the possibility of safeguarding) continuous external funding¹¹.

3.2 EFFECTIVENESS: DO WE DO THE RIGHT THINGS? AND IMPACT: IS OUR THEORY OF CHANGE CORRECT?

Measuring outcomes

At PO implementation level, monitoring is most often restricted to *input- output*-level. The higher we arrive in the intervention logic, namely at the level of *outcomes*, let alone *impact*, the more insufficient becomes the information, and the vaguer the indicators¹². Often, *outputs*, and *outcomes* or *effects* are mixed up, and *impact* is referred to the far future. In the reports we hardly read about the target-groups, and whether their situation changes as a result of the project, except in individual testimonies. Effectiveness refers to the project/programme objective (*outcome*). The questions we are dealing with on *outcome*-level is: *do we do the right things, so that we achieve the desired objectives* and: *are the project beneficiaries indeed making profitable use of the project realisations?* Unlike with *outputs*, which are under the control of the project, it is often difficult to attribute changes on *outcome*-level to the project interventions, since these changes also depend on external, contextual factors.

⁹ Indeed, during the partner conference in Nairobi ‘sustainability’ was placed high on the agenda for discussion (by PO directors).

¹⁰ See also Woord en Daad MFS aanvraag, p. 35/36 (Requirements with respect to sustainability) – in which sustainability is clearly defined. In every *project agreement* there is a section “*After project period*” in which sustainability aspects are defined. But when is a project considered finished?

¹¹ This was remarked by some PO during the Nairobi conference.

¹² During the Nairobi partner conference it appeared that there is still confusion about the meaning of these concepts.

Monitoring without and with indicators (infinite and finite projects)

When projects avail of indicators on the appropriate levels, monitoring becomes easier than is the case with projects in domains which are ill-defined, where the needs are 'endless' and it is hard to live up to expectations. In the latter cases, the service quality standard could (in this case) be a valid indicator on *outcome*-level: if the standards are met, then we 'do the right things'. However, several Woord en Daad partners have chosen difficult places (access, security) to intervene, and can only just make ends meet, while future funding is not always secure. In that case, a 'gap' is filled, but if standards are not met, these projects are vulnerable to criticism. Nevertheless, the Basic Needs evaluation's conclusion is that POs and their projects do best in challenging circumstances that they are able, just, to overcome.

Following TMF and MFS reporting formats, the co-financing organisations (and other NGO) think and report in terms of numbers of individuals reached (also on *outcome* level). For Adoption, Education and Job creation such a criterion seems appropriate. Generally, POs have been very successful in increasing the number of participants in schooling and training. In school frequentation, from 2004 till 2007 there has been a 29% increase (up to a total number of 58 000) – the increase in Africa is even 115%. The reported numbers of beneficiaries of literacy courses have also considerably increased. In all projects there is a gender balance in participation. Most schools in the programme score significantly better compared to average minimum standards and to average rates achieved in a given country for the same exam.

Many more details can be found in the Education evaluation report. It suffices here to remark that, for both schooling and literacy training, (quote) *the very fact of attending signifies a major effect as it not only means acquiring knowledge and aptitudes (and attitudes), but it also means socialising and interaction with peers and being recognised for it. Groups that had minimal chances because of often combined factors of poverty, multi-problem situation at family and personal levels, discrimination etc. have been given at least equal chances to enter and stay. A high percentage might otherwise not have studied*'. In the J&I evaluation report the same conclusion is drawn: *For many students VET is an in-depth investment of years ... people are not only empowered in technical skills but also in self awareness and confidence and this clearly shows in the individual testimonies provided in many reports*".

Also in the Job & Income programme numbers have increased. The VET – Vocational Education and Training courses¹³, which are obviously crucial instruments to link education with employment opportunities and self-employment, have success rates of more than 90% and modest drop-out rates¹⁴. A TVET evaluation of 2008 has identified many learning points and so has an evaluation of the VET interventions of TLM in Faizabad which W&D and partners have discussed and exploited. Crucial factors influencing effectiveness of VET are the adaptation of curricula to the demands of the market, the mediation efforts for internships and job-placements, and the attention given

¹³ The number of students benefiting from training is on target (above target) with an increase from 2005 to 2007 from 2,739 to 5,453.

¹⁴ The W&D supported VET are perhaps not better than other schools; their special success concerns the choice of targets which are consistently children of poor families and communities.

to life skills, particularly entrepreneurship and leadership. It is also recommended to work closer with communities (less centre based TVET services, more community based services), with the business world and NGOs involved in local development programmes, and to increase the capacity of TVET.

The success rates for effective job placements of JBC – Job and Business Centres, are not yet sufficient to reach significant impact¹⁵, and neither to request payment for such services. The reasons why they do not yet perform up to expectation are their short experience, their insufficient links with the private sector and insufficient capacity to study the labour market (either for wage employment or for self employment)¹⁶. Cooperation, networking and advocacy to influence both government and the business sector are still weak. JBC, just like VET, do not earn sufficient income to become sustainable entities.

Micro Enterprise Development, incl. MED – Micro Credits¹⁷ were evaluated in a number of countries, and generally lead to some form of poverty reduction. The micro credits increase. Many of them concern women (66%), which is still below the W&D target of 80%. Repayment rates are generally sufficient (95-100%). In the J&I evaluation report it is concluded however that micro-enterprise support and micro credits hardly lead to economic growth or the creation of employment on a significant scale. BDS delivery especially took place in the agricultural sector, much less in the micro-enterprise sector.

The SMED - Small and Medium Enterprise Development programme¹⁸ is especially implemented in Asia (mostly in Bangladesh) and Latin America (Nicaragua), but in Africa too the programme starts to grow. The number of enterprises supported is higher than planned, and the employment generation effect too. It seems that W&D's partners chosen for this activity are specialised institutions. The link between these activities (loans to SME) and the activities which the regular POs implement are not always clear. The most informative evaluation in this field concerned CSS in Bangladesh. In Bangladesh the programme seems very successful at the enterprise level, according to the indicator sheets. In the MED and SMED programmes, the focus is on implementation; lobby and advocacy for a better business environment are still rare.

Effectiveness and impact with regard to the Chain approach (education, vocational training or further schooling, market and job-facilitation – 'from boarder to breadwinner') will be discussed later (cf Woord en Daad policies).

On holistic level - progress assumed

Local positive impact of chain-activities, from education and vocational training to jobs, is certain but the data (from less than half the JBC) are insufficient to draw quantitative conclusions for the whole W&D programme. It is likely that education and training help in getting a job, but improved access to work (which needs qualification or certification) and

¹⁵ The most experienced partner in this respect, AMGF, claims a success rate of 65%. The 2008 ICCO, W&D and Educans evaluation claims that the success-rates should be between 70 and 90%.

¹⁶ Between 2005 and 2008 the budget for JBC was spent 74% only, as compared to the spending of the VET budget with 96%.

¹⁷ The formation of credit and loan groups proceeded faster than foreseen during the studied period.

¹⁸ The W&D 2007 year report mentions that in that year 650 new jobs were created, mainly in Bangladesh.

improved income (wage- or self-employment?) as a result of various forms of education and training are as yet difficult to prove statistically.

Many stakeholders think that children, educated under the W&D programme (or any other educational programme), show increased motivation, self-consciousness, confidence, self-respect, have no inferiority complex, are more open minded and show more initiative, are more determined and courageous, cooperative, industrious and sincere. These stakeholders also emphasize the positive impact of Christian education leading to a better Christian life such as care given in homes and other residential facilities (cf Education evaluation). So, these stakeholders *assume* that such children will be more successful in life than their more unfortunate peers, and so will Christian life be potentially better than a life without Christian values.

Similarly, it is *assumed* that pupils or ex-pupils who find work contribute to the family income. This *may* have reduced tensions in families; it *may* have diminished un-social behaviour by some youths. Whether in the end this has any effect on the community, has not been proved either. All these statements remain assumptions. Many PO projects are based on assumptions which are not proved and are sometimes doubtful. W&D's director, during one of the Woord en Daad internal reflection meetings, remarked that countries and cultures may differ: in Ethiopia it may be normal for family members who have received education and have a job to help the others, while in Burkina Faso this brotherhood solidarity may be much less common. It can even be added that the situation in Ethiopia is diverse, and so is the situation in Burkina Faso, depending on ethnic customs, or depending on degrees of attachment to 'traditional' values¹⁹.

The unruly context

Other assumptions or implicit truths were encountered in various documents from POs, where there was mention of 'model farmers', 'model schools', 'model families', even (implicitly) 'model spouses' (counselling on family level in Burkina Faso). The assumption is that the practices of the 'model farmer' or 'contact farmer' (in whom extra efforts and funds are invested), if proven successful, will be copied by the other farmers, that the 'model families', if rewarded (e.g. with prizes for sweeping and keeping courtyards clean) will be imitated by other families, etc. But in reality this is far from certain to happen. In the rural development sphere (in West Africa), the World Bank sponsored such an approach in agriculture in the nineteen-eighties, but the scheme failed. The 'models' are not by nature self-sustained and are unlikely to replicate. In the Woord en Daad case, the *theory of change* may not prove valid. This happens because the context – socio-economic, cultural – has not sufficiently been taken into account during project design and implementation. In certain societies, especially the societies where the 'poorest of the poor' are found (potential W&D target groups), and where environmental conditions may be harsh, people follow survival strategies and are not quick in adopting project innovations, and project logic. The socio-cultural frameworks on which these strategies are based, follow another logic than that of most development intervention strategies. These 'poorest of the poor' are the target groups which are the most difficult to 'reach' (this is recognized as a risk in W&D's MFS-proposal).

In order to reduce risks in projects it is recommended to put emphasis on the importance of studying the context on the one hand, of monitoring the direct *outcome* and *impact* of

¹⁹ Assumptions, just like objectives, have to be monitored, since (and every pupil of Logical Framework knows this!) assumptions, if they are not true, may turn into *killer assumptions* 'killing the project'.

projects on the other hand, and to situate results in context²⁰. Only by following these steps, more will be learned about poverty alleviation in these difficult contexts²¹. W&D could take up the idea which was launched in 2008 by de Gaay Fortman / Ruijters (for the Inspection unit of the Ministry), namely that evaluations should be less programme-oriented and more context-oriented. Finally, it is recommended that new programmes (such as rural development) profit from experiences from the past when many donor-funded programmes were executed. It would be a waste of effort to invent the wheel all over again.

²⁰ Woord en Daad has taken initiative in all these fields, cf 'Knowledge programme Economic Development', and 'Tracking local development'. Small-scale research projects found in the files were: small farmers in commodity chains; micro-enterprises and equity of growth; graduation of ME's into SME's; impact measurement tool of PAC, Nicaragua; financial and non-financial flows in agrobusiness. However, small-scale research in these fields should become (tailor-made) part of every project monitoring.

²¹ It is remarkable that in the TOR of this evaluation it was not asked to link programmes and their contexts.

4. Implementation by Woord en Daad

4.1 EFFICIENCY: DO WE DO THINGS WELL?

Assessment of the organisation

Woord en Daad, as a co-financing organisation and knowledge broker, is facing an enormous amount of challenges: developing policies, following the back-donor, keeping up partnership relations and relations with supporters, channelling funds, adapting to major changes in the field of International Cooperation, networking with many other organisations and institutions, etc. Woord en Daad moves in an extensive field, in which it reacts pro-actively to others, either in dependency, in authority or in neutral relationships of partnership and collaboration. The ultimate aim of this extensive network of relations of collaboration is defined as poverty alleviation through local partner organisations, as well as conscientisation of supporter networks, and vindication of the interests of the 'poorest of the poor'. Woord and Daad presently manages three major programmes²² (those under consideration in this document) on three continents. It has quickly grown during the last decade and intends to grow further.

All relevant organisational aspects which could interest the Dutch donor (DGIS) have been described in the MFS I Proposal (Organisatietoets: 10 chapters, 64 pp). These were not systematically subjected to the present evaluation. However, we have experienced the organisation in operation and have made acquaintance with many of its internal and external relationships (and all their POs during the Nairobi conference). Without doing an assessment ourselves, we gladly subscribe to the conclusions of earlier evaluations by our office (MDF, 2005/2006), which are still valid, namely:

"First and foremost Woord en Daad transpires a very professional and efficient image and it is well-known and respected for this. The Christian identity and inspiration is important at all levels of the organisation, the relationship it develops with partners and in all activities directed to target-groups in the Netherlands..."

The management style in Woord en Daad is open and pleasant and it enables staff to contribute to policy-making and organisational improvements in reflection and strategy meetings...

Woord en Daad has shown it is not afraid to innovate and further develop its activities. This has led to taking on new activities such as MSME-development as a logical next step in the chain approach. In the Netherlands the founding of the Business Platform is another example of innovation, targeting a new target-group of small and medium entrepreneurs, who are not served by many other development organisations ...

Woord en Daad possesses excellent skills for external communication targeted to specific target-groups and sponsors. In its communication it transpires openness and transparency...

With TMF and MFS funding by the Dutch government, Woord en Daad has made a big jump forward as a professional co-financing organisation. Its development clearly manifests itself in the (above mentioned) Proposal for MFS grants, which contains a coherent and thorough description of the web of intricate organisational and

²² Last year, a fourth programme, the Emergency Relief and Reconstruction Programme, has been integrated in the Basic Needs Programme.

grammatical cross relations. Reference is also made to a number of instruments used in planning, monitoring and evaluation.

Structure

The only relevant observation about the functional structure of the organisation in this context concerns the task-division in the handling of the J&I programme. In handling the J&I programme within W&D, since 2008, there has been a change: the Programme Department is responsible for VET and JBC while the Enterprise Development Department manages the MED and SMED programmes and all loan funds and operations in these programmes. The J&I evaluation suggests that the difference in approach and instruments between these departments have led to a different focus. The ED department is considering primarily those business development interventions at the micro, small and medium enterprise level that are economically viable. These interventions are not necessarily (and often are not) linked to the more 'social' interventions of the Programme Department. Those target groups in the TVET/JBC interventions that are starting self-employment initiatives are too risky investments for MED/SMED and are only supported under certain conditions. These different focuses have limited synergy between the departments while it is certainly so that MED and SMED interventions can create a positive context for other interventions of W&D and partners. Opportunities for such linkages have not occurred systematically. For more details about this sensitive issue, cf the Job and Income evaluation.

Capacity

In programme development, programme planning and programme monitoring Woord en Daad uses a large variety of instruments to learn from past experience, keeping an open mind for changes in the aid environment which result in updating its overall policy. These instruments include the annual and multi-annual policy planning cycle, the annual reporting system, conferences with the POs, the systematic evaluation of projects and programmes, participation in seminars and networks, the writing of vision papers, the writing of end-memos of project appraisals and evaluations, staff visits to projects, etc.

The above instruments and procedures are part of, one could say, a joint learning process of Woord en Daad and its partner organisations, and at the same time a joint capacity development trajectory which comprises *human resource* development, *organisational* development and *institutional* development, in order to serve the internal functioning of organisations, and to improve the collaboration between the organisations. For the latter purpose one of the most ambitious introductions by W&D was the urge to POs to conceive strategic multi-annual plans (SMAP). It took some time for the POs to finalize such plans, but these prove to be useful instruments for POs to orient their policies and to provide a framework for their long term collaboration with W&D²³, on a more programmatic basis. One of the important aspects of the strategic collaboration between W&D and their partners is long-term support which allows for multi-annual planning, and financial security which is important for programme development as well as for the PO's organisational development. The strategic planning has improved project proposals: they are more coherent, more in line with a strategy, with the POs mission and vision, and contain a future (i.e programmatic) perspective. The introduction of SMAPs (and the patient way it was introduced, with explanation and feed-back) has been welcomed by POs.

²³ In the Education evaluation it is recommended: "... it would be best that the SMAPs are elaborated jointly (with W&D). So that it is also an instrument for *mutual* capacity building".

Project cycle management

The project planning, monitoring and evaluation cycle is standard for all POs and is applied strictly and consistently. The steps in appraisal and the appraisal criteria are clear and adhered to. Even the handling time between proposal and grant decision is defined and should not exceed 6-8 weeks. The approval is officialised in a Project Agreement. The actual project identification and formulation process is very much steered by a two-way interactive communication whereby the PO takes the initiative and proposes projects for funding. Dialogue plays an important role, and during the process specific proposals are gradually improved. W&D does not openly push, demand or impose certain types of projects, but it may propose and suggest to POs certain strategies. Thus the W&D 'chain model' has found its way into POs plans, and SMAP are now a condition for funding. Recently, the alliance model of collaboration was also introduced in such a gradual way. VET and JBC approaches, contents and design have become quite standard, a result of past joint efforts of W&D and partners. However, W&D strictly recognizes the PO's knowledge of context, and strictly adheres to the principle of PO ownership of projects. There remains enough room for innovations (such as mobile VET centres by CDA). In all programmes, partners express their satisfaction about W&D support. In micro-finance programmes BDS seem undervalued.

The W&D policy is to make POs less W&D dependent. On the one hand W&D encourages and helps the POs to receive funds from other donors, and on the other hand W&D pushes POs to live up to harsh donor demands in terms of grant formats and grant conditions and bureaucracy. They jointly identify opportunities and problems and act very much in true partnership (an example is given in chapter 3.2 of the Basic Needs evaluation report). Such collaboration reinforces the bond between W&D and its partners. Not surprisingly, over the years, partners have praised W&D's transparency, attitude and willingness to go the extra mile while maintaining consistency.

Monitoring instruments consist of guidelines and formats for project formulation, indicator sheets, progress reporting by POs, regular visits by W&D staff, regular e-mail and telephone contacts, conferences and exposure visits. In the internal protocol for monitoring and control the processing of progress reports and responsibilities at different levels are clearly defined. Reporting conditions and requirements are already described in the Project Agreements, tailor-made, with the mentioning of key indicators. The requirements of MFS (programme) monitoring are linked to project monitoring. The formats are functional and comprehensive. Still, the writing of progress reports of several POs show shortcomings in terms of objectivity ('nothing ever seems to go wrong'), adequacy and time limits. They may lack essential management information and also lack mentioning and elaboration of learning points. Some of them lack objective analysis and critical reflection. There is room for improvement here, i.e. in the *use* of the instruments. Financial reports are generally regular and adequate. Visits by W&D staff to all POs (annual and five-yearly) are considered very valuable by POs and evaluators. From the Education evaluation report:

“(the visits) are the core instruments for project monitoring and follow-up, both of management-related topics and of content matter. In addition, it makes quick decision-making possible ..., as the CEO and heads of departments are participating frequently. Visits are functional for the mutual (personal) contacts which bring the organisations closer together and give ‘a signature’ to the type of partnership W&D envisages. It also

makes it possible for W&D staff to keep a feeling with projects and people responsible for it, as well as to learn from discussions and to verify the validity of their own points of view”.

The reports of the field visits by W&D staff are very well written and provide a wealth of information on progress and on process.

Considering the monitoring products as a whole, the three programme evaluations have made it obvious that little complete/consolidated information per project is available in the W&D data bank. Much more effort has to be done to standardize information from different projects, and to present it in consolidated form so that project evaluations may be mutually comparable, and that programme evaluations may use the data in aggregated form, which would enormously simplify the evaluation process and make it much more efficient.

W&D thus gives guidance and feedback during all stages of the project cycle and also asks for feedback (yearly partner satisfaction survey, see above). The ultimate value of monitoring is to learn lessons and to identify best practices, or to analyse success, which could then be replicated elsewhere. We have the impression that successes are not always noticed, and that little cross fertilization between projects and partners takes place, apart from major models.

The Basic Needs and Education evaluators feel that the biggest shortcoming in actual monitoring practices is that the need for external input in the form of professional expertise is not always recognized.

4.2 EFFECTIVENESS: DO WE DO THE RIGHT THINGS? AND IMPACT: IS OUR THEORY OF CHANGE CORRECT?

Quality management

The instruments and procedures for quality management (conditions for granting of funds, reporting requirements, sanctions, etc.) are formally described in a W&D quality handbook (cf MFS aanvraag, p.39/226). The evaluations found evidence that the procedures are consistently respected, and conclude that the allocation of funds and the implementation of projects are managed and controlled in an honest and transparent way.

Outcome, effect and impact

While the last chapter of this document concerned the execution of projects by the POs, this chapter is concerned with the input by W&D to reinforce programmatic aspects. W&D does not only contribute to capacity strengthening of the POs, it has also the ambition to assist the partners in developing their strategies, and to improve the efficiency and effectiveness of their interventions. W&D does this through their monitoring and evaluation systems, and through research²⁴. Therefore, it might be expected of W&D that they assure that *outcomes* and provisional *impact* are registered in the context of projects. Success or lack of success on programme level *must* be shown through measurement of *outcomes*. This obligation should be considered a necessary measure of accountability and credibility *vis a vis* donors, supporters, project-implementers, and the whole W&D family of POs who are annually assembled to discuss the progress of their work. The monitoring on the mentioned *outcome* and *impact* levels is in most projects still

²⁴ In the context of the Job and Income projects, the evaluation identified 15 project evaluations, 13 research projects and 18 learning inventories.

rudimentary, and the quality of project evaluations is not always sufficient. Short-lasting programme evaluation missions are not in a position to collect data in the field (since W&D evaluations are mainly based on documentary research). Therefore, the *outcome*, and *impact* measurement should take place on PO-(programme/project) level, situating these in context. And W&D is to provide the instruments for these measurements. The measurements should concern the combination of programmes/projects in three fields (Basic Needs, Education and Job and Income), and cover pupils²⁵, families and the community of the pupils (or the employed).

With the knowledge collected, the strategy of the chain approach can either be propagated on a larger scale or in a wider context, or it can be modified to fit different contexts (e.g. rural areas, which will need, perhaps, other kind of chains). If the chain approach yields tangible results, it might be publicised as a feasible model of integrated poverty alleviation.

W&D has embarked on a research trajectory studying impact, together with the University of Amsterdam (Ton Dietz, Fred Zaal) and others. In this trajectory, it is proposed to 'topple' the evaluation perspective: not to take the programmes and their policy as the point of departure, "but the poverty situation, including its underlying causes in that particular area, the perception of the population with regard to this poverty situation, and the degree to which the aid interventions were directed at the removal of these perceived causes of poverty²⁶". This goes deeper than a *problem analysis*, or a *needs assessment*. It directly concerns the question: *is our theory of change correct?* This question can also be asked on community or even family level, not only on regional level (Northern Ghana, Southern Burkina Faso). Reading the first documents of the Impact study we feel that something similar can also be done on local project level.

The evaluators expect that through this research Woord en Daad will increase its knowledge about development processes and the impact of development interventions.

The proposed perspective is in line with the recommendation to the IOB²⁷, namely not to look from policy to reality, but to chose (as a matter of principle) to formulate the policy evaluation questions on the basis of reality (local stakeholders and context). Considering W&D's keen interest in learning and applying new theories and methodologies, it is recommended that they adopt the above ideas in their evaluation policy for all their programmes in all their intervention countries, and aspire to play a forerunner role in this respect.

Context

A second recommended W&D intervention is to precede the programme interventions (in the future). It concerns the promotion (organized by PO's) of more profound studies of the direct project context in order to be able to construct a more viable and feasible *theory of change*, the same theory which is tested in the programmes and validated through

²⁵ In fact, W&D with some partners have recently developed student tracking systems (CSS, AMG Phil). This system is being tested. It is recommended to have all partners adopt such tracking systems.

²⁶ Cf Ton Dietz and Sjoerd Zanen, *Assessing interventions and change among presumed beneficiaries of 'development': a toppled perspective on impact evaluation*; in: The Netherlands Yearbook on International Cooperation (2008, forthcoming), Paul Hoebink (ed); Van Gorcum.

²⁷ Van overkant tot overkant. Onderzoek naar aard en aanpak van de IOB-evaluatie van het Nederlands Afrikabeleid Bilateraal 1998-2006, by Bas de Gaay Fortman en Arie de Ruijter, 2008.

monitoring and evaluation processes²⁸. The research serving this purpose is not only to be of a classical socio-economic perspective but much more of a socio-cultural and psychological nature – its target groups may consist especially of experienced resource persons. It is not primarily *homo economicus* (self interest, costs and benefits) who will be studied but rather *homo honoris* (self-esteem, trustworthiness, wish to be respected) and the *ethics of care* (social cohesion, partnership, responsibility, contextual calculus)²⁹. The main question is what can be expected (in terms of behaviour) of all stakeholders in the project environment, given cultural, moral, social, economical and psychological conditions which prevail in that environment, and to construct strategies on those realistic expectations. Such strategies will contribute to the effectiveness, the achievement of *outcomes* of the intervention programmes.

If Woord en Daad decides to implement the above recommendation, this would lead to *theories of change* and strategies of SMAPs which are better embedded in the context, which in turn would contribute to a higher chance of desired outcomes.

Reporting the MFS programme

W&D's Annual Reports are beautiful and informative for a broad range of supporters, donors and for the public. The contents of the report are more than sufficient for accountability purposes. Results are conveniently presented and they show effectiveness: realization of actions as compared to the planning.

However, they are aggregated data, adding up figures from different countries and different contexts, produced by different partners. This way of reporting is the consequence of the format of planning required by MFS. These data only reveal something of the performance (capacity and competence) of W&D and their partners, they are W&D-centric. With respect to the way or degree in which these results on outcome and impact levels) have contributed to the alleviation of poverty somewhere in the world these data are not very informative. Poverty is contextual. Indicators of poverty alleviation are only meaningful if they are context-specific. The figures presented are accumulations, but in fact these accumulated data do not make sense, they are like adding up apples and pears. Neither are these data related to other relevant results which contribute to poverty alleviation. A holistic picture of the way in which, in a particular context, a W&D partner has managed to reduce poverty (and how this poverty reduction has contributed to poverty alleviation in the city quarter, the district, province or country concerned) remains unexplained.

All (MFS) co-financing organisations in the Netherlands do it in this way, and the figures in their reports, all added up, look impressive, but do not inform anybody about the reduction of poverty³⁰, since they are sector-specific and do not concern a 'whole' human condition³¹. It is recommended to start to think presenting figures (also) in another way, a way in which realizations are given a comprehensive meaning in a given context (in which

²⁸ The assumption that POs, per definition, *know* the context may not always be valid when it comes to the design of development strategies. Experiences in Africa have shown that local NGOs do not necessarily perform better in this respect than do donor/expatriate-steered projects. The research proposed could focus on searching for *best practices* in rural development strategies in the project environment.

²⁹ Cf W.T. de Groot: *Environmental Science Theory, Concepts and methods in a one-world, problem-oriented paradigm*. Elsevier 1992.

³⁰ Most of the accumulated figures of Dutch development organisations' realizations do not even fit in with the Millennium Development Goals indicators.

³¹ Only the narrative testimonies in the W&D reports do so, but they are anecdotal.

also other factors and actors are operational). In developing such an approach W&D could play a forerunner role.

Knowledge brokerage

Important issues which came out of these evaluations concern the role W&D should play as a knowledge broker. There seems to be a dilemma:

1. On the one hand. How much knowledge must W&D itself dispose of? Should it recruit more sectoral specialists? Should the POs recruit more specialised personnel? Should W&D staff play more the role of technical back stopper of the PO's projects? Should W&D send technical specialists to assist the PO with project implementation?
2. On the other hand. Would it be better to look for expertise outside W&D and outside the POs? Would it be preferable that W&D and its POs engage in network relations with professional knowledge institutions and centres of excellence, on a timely basis (W&D itself speaks of 'network partners')?

The dilemma seems to turn around the point how much the organisation should do, or should be able to do on its own, and how much professionalism should be hired or outsourced or left to temporary or *ad hoc* partners?

It seems that in the past W&D and its partners have been over-confident concerning their own capacity to be able to realise whatever they themselves imagined to be good³². This has led to interesting learning processes, but also to limited effectiveness and efficiency in certain cases, and insufficient use made of innovative and professional ideas and insights available in the vicinity. The challenge is about W&D's and its partner's role: to be the 'owners' of knowledge themselves, or rather to be 'brokers' in knowledge and 'facilitators' in knowledge application. It seems that the latter alternative seems more interesting in modern times. See also below, 5.1 and 6.2.

³² This is a statement made by a staffmember of W&D.

5. Woord en Daad relations with partner organisations

5.1 EFFICIENCY: DO WE DO THINGS WELL?

Partnership in practice

Woord en Daad has a clear partner policy (cf chapter 3 MFS aanvraag). *Visie documents* 'Partnerbeleid van Woord en Daad' build on earlier policy discussions, and present challenges for the future. It is expected that the partner policy will be substantially revised in the near future, after consultation with all the partners in March/April 2009. W&D is even developing a vision for the year 2020, and hence for the future of its organisation and future relations with its POs.

Client surveys reveal that the partners are very happy with Woord en Daad. They rate W&D as a nice partner to work with, who is reliable, progressive, transparent, and professional – and who is an equal partner. They are satisfied with the W&D input in their policy. They value W&D's way of communication. They think that the W&D's working visits have a clear added value. W&D gives good and useful advice. There are very few issues on which W&D scores differently during the last three assessments. One narrative comment deserves to be cited (CDA Colombia):

CDA appreciates having W&D as a partner not only for the financial support received but because W&D is an organisation in constant search of excellence and productivity. Having a relation with such an organisation demands from us continual growth and improvement. It is valuable that W&D is now taking more interest in research and quality. This will surely reflect on the final outcomes of social interventions done. Sharing knowledge and experiences with W&D partners is important and will contribute to the strengthening of our organisations.

W&D staff, on average, rates their partners (POs) as average to good (between 3 and 4 on a scale from 1-5) as average score on 5 criteria (vision, identity; systems in place; learning; staff; communication; plans-reports; relevance, effects)³³. The highest score was given for "vision, identity" (3,9) and the lowest score for "plans-reports" (3,3). Among all staff-members (departments) there are three POs which appear in the top-10 list of each of them. It does not show from this inventory how, according to W&D staff, the POs have progressed over time. These data were confirmed by the internet-survey (this evaluation).

Instead of judging each other one could ask both W&D and the POs to assess the *partnership* between them as such, and both the PO and W&D might give scores on agreed partnership-criteria (see DFID Spider Diagramme in Basic Needs report).

The good partnership is mentioned by all three evaluators which they illustrate by the constant dialogue, cooperation in planning and policy development, accommodating attitude, feed-back, open and frank exchange, advice without top-down judgements, transparency, etc. It is concluded in the report of the Basic Needs evaluation: *The relationships have proven themselves over time, in the actual actions of both W&D and POs, which, time after time, reconfirm what have meanwhile become tacit agreements.*

³³ Report Internal Inventory of Partner Performance (concept) – internal inventory in November 2008.

With partnerships progressing over time and capacity development by the POs, new challenges lie ahead. One may expect that partners become more self-conscious, and this in its turn will change the partnerships. W&D presently reconsiders the concepts of 'participation' and 'ownership' in partnerships, whereby partners may play a much bigger role on the levels of implementation of projects and programmes, monitoring and evaluation, formulation of projects and programmes, conceiving strategic multi-annual plans and policy formulation. Further, regional partner alliances may be created with direct access to funds from different donors. It is possible that within a decade the nature and character of the W&D organisation (or must we say W&D network or association) has completely changed – fusions with other Dutch and/or European partners is also not excluded. A beginning of such transformations, i.e. changing partnership relations within the W&D partner alliance was discussed during the March 2009 partner conference in Nairobi.

W&D has also introduced the concept of 'network partners', being more specialised organisations (e.g. in educational development, lobby and advocacy, assistance in HIV/Aids programmes) which are supported by W&D for specific purposes and for specific periods of time. The network partners are to improve the quality of the PO's projects/programmes. Special forms of network partners are organisations with a focus on business development. They are to create local business platforms which, with colleagues from the North, provide training and coaching to local, starting entrepreneurs. Through W&D certain Dutch enterprises (presently 120) want to play a bigger role in development cooperation in the form of providing funds and expertise. They are important for fundraising, and presently represent 15% of W&D's income.

During the last years the networks, partner-webs, associations and alliances of national and international partners of W&D have been (or will be) extended, and more South-South cooperation will be stimulated. They enable to acquire institutional funds together, and also lead to strategic cooperation. Cf W&D MFS aanvraag and Annual reports, and Draft Policy Plan 2011-2014.

5.2 EFFECTIVENESS: *DO WE DO THE RIGHT THINGS?* AND IMPACT: *IS OUR THEORY OF CHANGE CORRECT?*

The genesis of partnerships

In the beginning, W&D 'met' partners; their ways happened to cross. They made their acquaintance, found out that their identity was similar, and that their Christian inspiration and values with respect to fellow-men and their development corresponded. On a personal basis it 'clicked'. Thereupon W&D checked on the quality of the potential partner's organisation³⁴, its interests and competence, its culture, its way of working, the chances of collaboration and co-financing, and together they decided to enter into a partnership, often compared to a 'marriage'. W&D then started funding modest projects, continued with funding forms of capacity building, and later with some linking and learning until the partner started to profit from the full range of possibilities W&D can provide. The underlying idea of this 'marriage' is that it lasts for an indefinite period of time. Relationships are to become ever more reciprocal.

³⁴ Selection criteria of partners are well described in the MFS programme proposal (p.34).

Woord en Daad formally defines partnership as “*an organizational and personal relationship which engages in activities that are characterized by a shared sense of biblical values, purpose and intentions, interacts interdependently and allows for negotiation and is mutually respectful and enabling*”. The following characteristics are meant to be present, to be respected or developed in partnerships: mutual trust, complementary strengths, reciprocal accountability, joint decision-making, a two-way exchange of information, clearly articulated goals, equitable distribution of costs and benefits, performance indicators and mechanisms to measure and monitor performance, clear definition of responsibilities and procedures for handling disputes, shared perceptions, a notion of mutuality with give-and-take, mutual support and constructive advocacy, transparency with regard to financial matters on both sides, long-term commitment to working together, recognition of other partnerships³⁵.

Are these partnerships functioning well, do they yield optimal results, in which fields? Could the results be better, and if yes, under which conditions? What is the added value of such partnerships, and what are their comparable advantages? And finally, if they have added value, where does the force of their energy come from, and what is the identity of the partnerships?

Projects as ‘*raison d’être*’

W&D ‘enables’: it helps POs with project proposals, with speedy reactions and advice, helps to find other donors, helps with grant proposals³⁶. The results are shared and considered joint responsibility which were realized with complementary inputs. Partners have repeatedly praised W&D’s willingness and frankness, openness, even with the dealing of minor partnership problems. In certain crises, the partnership has not suffered, but has reinforced (e.g. when proposals were refused by other donors).

Projects are the outcome of partnerships. In fact the partnerships need the projects to remain viable. They seem to flourish in situations of challenge or crisis. The programme fuels the partnership with new energy. With too much routine, the partnerships go stale. The partnerships need renewal and innovation, they need challenges. W&D as well as its partners are in a constant process of developing from charity to development organisations. And now the partnerships are about to be developed in flexible networks. It seems essential to address and resolve challenging issues, and in partners these efforts generate new capacities. So, partnership between W&D and its partners develop, improve, and so become ever more challenging for both parties. Of course, in partnership, both parties have their own interests which have to be served. Perhaps sponsorship is such an interest for W&D: sponsorships keep supporters in the Netherlands motivated, and so keeps the donations coming in. Therefore, the administration of sponsorships on PO level should be perfectly in order. When this was not the case with one of the partners, relations were put to the test.

A condition for good partnership is that projects (or rather programmes) do not become routine but are ever continuing learning processes, not closed or finite entities. In the context of broader partner-networks, successes must become models which can be shared mutually. W&D is still the main knowledge-broker and enabler, but a number of the

³⁵ Cf Draft Policy Plan 2011-2014.

³⁶ In the near future, W&D wants to steer on results only, and thus wants to move away from direct PO needs.

partners may take over roles and challenge W&D's authority, especially if their independent access to other funds has made them less dependent on W&D financially.

Conditions for success in partnerships

On the meta-level we may conclude that the success of W&D partnerships depends on the following parameters:

- the partners recognize and appreciate in each other a joint Christian 'identity' or world vision and the respect of 'core values'; on a personal basis it 'clicks';
- the partnership is equal
- and is based on complementary roles and reciprocal interests, and this is recognized by each party;
- the partners have the ability to rouse synergy in their relationship;
- the partnership is (supposed to be) long lasting; duration in joint implementation gives energy to both;
- the partnership is result-oriented, dynamic and innovative (challenging) by intent.

The Woord en Daad partner policy and policy implementation may be considered as excellent. However, there are new challenges ahead which are linked to the changing situation in the world in general and in the aid industry in particular. These challenges were a subject for discussion during the W&D March/April 2009 partner conference. POs follow Woord en Daad in a new partnership model as long as their main interests are not threatened.

Theory of change

From the Woord en Daad 'home' point of view, it tries to combat poverty through civil society partner-organisations in the South. So do all non-government co-financing organisations, which choose partners with whom they share core values, which have objectives that match with their own and which have a certain capacity to execute activities. Partnerships are either long-lasting or short-lasting. The partnership's main objectives are to achieve results in the field of poverty reduction, and to create an infrastructure for the execution of development activities. The comparative advantage of civil society organisations is that they approach the population differently than the government agencies do. Ideally, those two approaches are complementary.

Woord en Daad is called an enabler which means that it reinforces partner organisations so that these are able to execute 'projects' more or less efficiently and effectively. Woord en Daad gives content to such an enabling role by mobilizing all kinds of resources: funds, information, expert advice, network-services, etc. Through these resources the partner organisations are expected to function better and to increase their impact in the environment they operate.

Still, because of their limited means, and the enormity of the problems which occur in the partner's environment (they have chosen the most difficult and 'poorest' environments) their impact, how valuable it may be, remains very limited in an absolute sense. The questions which may be asked is what is the added value of such a methodology, and whether the methodology followed is the most efficient way of poverty alleviation, and how efficiency could be improved? With other words, when does such a methodology represent the best possible *theory of change*?

Without going too deep into this matter here, a few remarks may be made which fit the conditions under which Woord en Daad intervenes through its POs. In any case, what does not seem desirable is when POs operate in an isolated way, and when they do so continuously without increasing their range, both numerically and activity-wise (i.e. running a school with a certain capacity without linking education to complementary fields in order to create future perspectives for pupils after leaving school). Woord en Daad is consciously looking for integrated approaches, innovating methodologies, networking, etc.

In what Woord en Daad is trying to realise, one discerns a pattern, which could perhaps be formalised to function as a leading principle for partnership perspective intentions.

1. In order to develop and expand POs must “link and learn”. This principle implies networking (other POs, government, business sectors) and linking up with expert knowledge sources (other POs, business world, specialised institutions) . The ultimate aim is to innovate and to enhance impact.
2. The PO’s interventions should ideally have the effect of an ink blot, or a ripple effect, which means that results of actions are multiplied by third parties or beneficiaries.
3. Ripple-effects would also be realized if innovative, effective approaches by PO are taken over by other NGO’s, or the government.

The above points are considered as essential added values of partnerships. They give a partnership-system a dynamic component. The lack of critical mass (characteristic for a low number of POs in a country or a region), which is potentially a limiting factor for Woord en Daad impact, could thus be compensated for by an expansion mechanism which increases the impact through the diffusion of approaches and methodologies (through lobby and advocacy on local and sub-local levels³⁷). The prerequisite for such a (network?) mechanism is the adoption and development of innovative approaches which have proved to be effective and to have impact³⁸. Lobby and advocacy demands from Woord en Daad a higher ambition level.

Because of the constant focus on learning and innovation, Woord en Daad and its POs are considered capable of producing that added value which makes their partnership relationship more than a comfortable, charitable, spiritual brotherhood, but rather a challenging, exciting experience which re-creates the Woord en Daad desired image of innovative forerunners in the fight against poverty for the benefit of the ‘poorest of the poor’.

³⁷ Woord en Daad has drafted a sophisticated Beleidsplan Beleidsbeïnvloeding 2007-2010. The implementation of this plan (partially adapted to new insights) needs acceleration.

³⁸ Therefore, a good (monitoring and evaluation) measurement of outcome and impact is also a prerequisite for the diffusion of approaches which (are supposed to) have proved their value.

6. Woord en Daad policies

6.1 OVERALL W&D POLICY

In the W&D policy plan 2004-2007 the contours of the actual policy of W&D have become clear and explicit. In the 2007-2010 policy plan the former policy did not considerably change, but under the influence of the MFS-format the policy was presented in a different way.

Ambitions introduced in the 2004-2007 plan included the intention to grow considerably, through the increase in financial adoption (sponsoring of children), through external institutional funding (TMF), and linkage with the Dutch private sector to increase funding for SMED. The number of countries was to increase, especially in Africa. The main development objective was formulated as 'poverty reduction', and the target groups remained the poorest sections of the population and marginalised groups (children, women, young people at risk). The most important policy elements are ever since:

1. A programmatic way of working, with an integration of three major programmes: Education, Job and Income (including VET, SME development and Micro-credit) and Basic Needs: initiatives integrating activities at community level, in health, water/sanitation, agriculture, environment and HIV/Aids.
2. Chain approach: in which programme activities were integrated, starting with primary education from which children stream into secondary education (academic or vocational), followed by mediation in finding employment or to become self-employed (enterprise development/micro credit). "Basic needs" were considered (pre) conditional for Education and Job and Income programmes to be successful.
3. The transmission of Christian norms and values (through education) while respecting context.
4. Empowerment: target groups have the capacity and succeed in taking initiatives, decide on their future and have better control, translated into "better positioning of the individual on the labour market to earn an income".
5. Partnership as a principled approach to participation, based on equality, recognition of the independence of POs, reciprocal feedback and policy influencing.

In the 2007-2010 plan the three "MFS strategies" direct poverty alleviation", "development of civil society" and "policy influencing" were introduced. These strategies are considered as transversal for all the W&D programmes in the chain-approach. The strategies were worked out for each programme. The result-based methodology (accountability at output, outcome and effect levels) was and is rigorously applied.

Especially the MFS-approach changed the way of working of W&D and its partners, which became more result-oriented and more "smart".

Presently, half-way the strategic plan period and the MFS-I funding period, Woord en Daad has started preparing for the 2011-2014 plan period and the second round of MFS. It has started this process gradually and accelerated it in 2008 with internal as well as partnership discussions on the future, and Woord en Daad's answer on the changing world, the changing aid architecture, etc., and the organisation, execution and validation

of three programme evaluations³⁹. During the Partner conference in Nairobi (March/April 2009) the points of departure for a future Woord en Daad strategy were *officially and formally* adopted by the whole Woord en Daad “family” – headquarters and partner organisations. It can not sufficiently be stressed that the coming strategy plan (to be worked out in a funding proposal) must be considered a joint Woord en Daad product, and proof of the participation of Southern partners in the strategic management of the Woord en Daad organisation⁴⁰.

Without dealing in too much detail with the proceedings of the Woord en Daad Partner conference in Nairobi, we will limit ourselves to the points of departure of an adapted long-term strategy, and the main points of discussion.

Two days of presentation and discussion were dedicated to the three programme evaluations

6.2 THE CONSTITUENT PARTS - EVALUATED

1. Basic Needs Programme policy

In the drawing of the W&D J&I chain, basic needs relate to *layers* of family and community of which individual members proceed through trajectories of schooling, training and employment. Thus, a clear *relationship* with the other programmes is suggested. But what sort of layers are we talking about, and what sort of relationship?

The Basic Needs evaluation concludes in the following wording:

This programme has no overall policy, in spite of W&D trying to define such a policy... The Basic Needs programme has been seen by some as supportive, a provider of an environment in which the other programmes can perform... as an enabler of those programmes... In fact, its parts do not easily add up to a definable entity ... the programme is the sum total of individual, stand alone projects...

These ‘stand alone’ projects (which concern curative health, primary healthcare, HIV/Aids, water/sanitation, food, agriculture, or housing/community development) were identified by POs which acted on the basis of perceived needs of the population whom it had selected as a target group – and with which W&D, partner and donor of the PO, had agreed.

Subsequently, those projects were (arbitrarily) grouped together in a programmatic entity, and were funded in the context of Prisma. The fact that the projects are not all of the same kind, is because the PO’s operating in the W&D programmes are not sectoral organisations - they are most of the time multi-sectoral NGOs or CSOs – and they operate in a polyvalent and situation-specific reality since poverty represents such a reality.

Thematic restrictions in the BN programme are not desirable: *situation-specific restrictions are recommendable* (BN evaluation).

The question is: should this collection of (relevant, useful) projects be an entity with clearly coherent objectives, and with a corporate identity? If that were required it is a problem, not of W&D development policy, but of compartmentalised donor institutions which cut up

³⁹ Some smaller evaluations were also executed, such as: The Cooperation between Woord en Daad and four Dutch organisations in the framework of the MFS programme (Bert van de Putte, February 2009).

⁴⁰ Woord en Daad has no Southern partners in its Board. The formal influence of the Southern partners in Woord en Daad policies is exerted through *formal* decision making during joint partner conferences.

reality in sectors, and fund only sectoral parts which fit in their own choices or *theory of change*. But 'basic needs' of poor people are of all kinds, depending on the context and on many other circumstances. What would most fit W&D's needs is a polyvalent programme, broadly defined (without quantitative indicators), embracing a variety of *infinite* actions relevant for polyvalent poverty alleviation in marginal areas – excluding education and job-and-income, since these are already covered by other programmes. *The time dimension that is intrinsic to the BN domain thus ought to be a serious consideration in project conceptualisation and design* (BN evaluation). Conceiving projects as 'black boxes' in such a context is not adequate.

What is also important to consider in this programme is the ability of POs to implement and achieve results. For the implementation of projects one needs a PO with the right identity and strength and the potential to use that strength. It should be the PO best suited to address the opportunity presented. It should have a comparable advantage over other POs to face the challenge. POs can not do everything alone, and should not want to do so. In this study the value of networking is stressed. Bringing together in certain localities the competence and capacity of 'specialised' organisations enables the building up of diversity, quantity as well as quality in service delivery. The final goal of target groups supported by W&D POs, should be to create *coherence* and *complementarity* between projects of all programmes being implemented in a certain community, and between all partners, and thus to create *win-win situations*.

Particularly efficient would be the use in W&D projects, over time, of human resources and competences which the programme itself has generated (trained priests, the use of tutored children in other programmes, such as advocacy)⁴¹.

In all programme evaluations it is recommended that, on all levels, authoritative professional knowledge should be better employed in the programmes and projects.

Within the BN programme (as in any MFS programme) there are three strategies required: direct poverty alleviation (DPA), civil society strengthening (CSS) and policy influencing (PI). Presently, almost all projects are labelled DPA. There are possibilities to link these strategies:

- At project level, to alleviate poverty (DPA) *through* civil society strengthening (CSS), and if successful, to develop this into a model, to be used for policy influencing (PI).
- A process-model: to start with small projects of DPA managed by PO, to be followed by strengthening PO capacities (CSS, a process which W&D is accustomed to do with its POs), then to link more organisations in a network in order to enhance critical mass and increase allies, after which mobilization of people for lobbying purposes (PI) becomes feasible.

2. The Education Programme policy

If Basic Needs is a (pre) condition, then Education is the first step in the chain-approach, which focuses explicitly on the economic aspect. The overall objective of the Education programme is formulated (by the Education evaluation) as: *increased opportunities for children and their parents to enter and stay in the labour market, and in the end better possibilities to earn an income*.

The programme focus on the chain approach is relevant and coherent. It puts into perspective the function of basic and secondary education, the need to have follow up at

⁴¹ In the BN evaluation called a 'circular design'.

other education levels and vocational and technical training. Education is not sufficient a condition to enter the labour market and earn an income, other conditions have also to be fulfilled, like possibilities for children to access (vocational) training, to obtain assistance to enter the labour market, to receive micro-credits and/or to receive business development assistance – all provided by W&D programmes.

The education programme policy looks at education from the perspective of the individual and hardly from the perspective of family, local community or society at large. The Education evaluation study opts for a more holistic vision of education, which *relates opportunities of the child in terms of work and income and personal development, as well as a broader function of education for the community and society at large, with attention for possible additional and integrated interventions other than only providing for basic care and pay for access to schools*. Thus, the choice for a focus on the chain approach and economic empowerment would be better justified. A number of POs already work in this sense.

A broader vision on education has to be developed. Since the ‘personal development’ objective is part of the education programme objectives, a strategy has to be developed for the way in which to contribute to that development, other than transferring Christian norms and values⁴². Fundamental research and exchange of information should take place in order to better understand the problems related to the education sector in the countries where W&D is active, contextual issues (government versus private education; the value added of Christian education), issues with respect to the language of instruction, specific problems poor children are facing, the possibility for lobbying and advocacy (a subject which is underdeveloped in the programme until now), differences between urban and rural educational environments, the availability of different education models and approaches, and the availability of centres of specialisation and excellence.

Experience in the education programme shows that innovation often comes from the base (PO). W&D has a role to play in the cross-fertilization of POs in this respect, which is the added value of having the network of W&E partner organisations, which also regularly meet. W&D could play a more important role as knowledge broker. W&D may also be instrumental in working out certain concepts which are until now not well applied in the education projects, like ownership, social accountability, relevance of education content matter, transfer of values and norms through Christian education, and especially sustainability.

3. The Job and Income Programme policy

The Job and Income Programme is characterized by four sub-programmes which are linked in the so-called chain approach. These sub-programmes are VET, JBC, MED and SMED respectively. The chain approach is generally effective, but the evaluation still recommends internal and external policy improvements, particularly where the linking of the separately managed MED and SMED subprogrammes with the other W&D programmes is concerned.

Among the chain-internal suggestions we mention here: linking MED and SMED activities geographically or in the external environment of other W&D interventions would create more synergy with the other programme sub-components, improvement of the task descriptions of JBC, particularly with respect to a vision on (the dynamics of) wage-

⁴² Such as in the case of HIV/Aids for which the policy/strategy is clear.

versus self-employment; more linkages and cooperation between TVET initiatives with other local and national institutions to improve chances for (financial) sustainability; more attention for lobby and advocacy to ensure linking of education investments, producing a young adult labour force with the private sector in need of skilled hands.

External to the chain: a. it could be considered to embed the whole programme better in the local context and thus to enhance its sustainability; b. cooperation, networking and knowledge sharing with external expert organisations and resource persons could enhance the quality of the programme and lead to innovation; c. outreach, lobby and advocacy could be reinforced to improve the enablement of the business environment. For all sub-programmes it is recommended to pay more attention to entrepreneurship development, business incubation and business development services support.

With regard to policy issues the following actions are suggested:

VET: to look for alternative approaches in order to improve quality and efficiency, to look for possibilities to enhance the sustainability of VTC, and to look for better embedding of VTC in communities and extended contacts with the business world. The curriculum could also include entrepreneurship skills.

JBC: since they are a critical link between VTC and the market, increase their effectiveness and efficiency, e.g. through increasing knowledge about the dynamism of self- versus wage employment and contacts with the business world and labour market. A closer relationship between JBC and VET could also be considered (JBC staff as trainers?)

MED: in addition to catering for broader target-groups, maintain a link with TVET/JBC institutes to provide support to those initiatives of ex-graduates that have potential for growth and sustainability. Moreover, it is recommended to keep combining financial and business development services, particularly for the smaller enterprises that need BDS support in order to increase chances for success. A triangle of relations should be maintained or created, namely between VET, MED (and SMED) and communities from where VET graduates originate, in order to increase the social relevance of the J&I programme. This might require subsidising some of the MED (and SMED) BDS interventions, as this cannot be done by the ED department, with its own vision on sustainability.

SMED: the biggest challenge for this programme is to integrate better with the other components of W&D programmes, so that they contribute to the programme as a whole by providing external demand for skills from TVET interventions and by contributing to an improved economic environment in those communities where other programmes of W&D partners are running (i.c. the creation of employment from which ex-VET pupils and/or their family members may profit). This would require requesting the SMED partners to actively look for geographic and target-group linkages, providing that interventions follow market conditions.

4. Validation

The conclusions of the three evaluations and the meta-analysis have been validated during the partner conference in Nairobi. The validation took place in five steps:

- a. Plenary presentation of the conclusions of all evaluations (30 minutes per evaluation) by the evaluators, with possibility for questions of clarification only.

- b. In five workshops (education, basic needs, job and income x2, directors): treatment in small groups of the leading questions: Are the conclusions and recommendations clear? Do they need amendments to be clearer? Could you explain them to the group?
- c. In the same workshops: treatment of the next leading question: Are conclusions valid in your specific situation or organisation? If not, please explain in narrative form why not. The answers were visually presented (scores for yes-no-not applicable).
- d. In the same workshops: treatment of the question: Which conclusions/recommendations should be an issue for the entire group to discuss. The issues proposed were also scored and arranged in order of priority. For the Director's group the issues, in order of priority, were:
 - Core values
 - Sustainability
 - Linkage of programmes to chain-approach
 - Holistic approach
 - Local embedding of projects
 - Expertise and learning in projects
 - Monitoring outcome/impact
 - Future of partnership
 - Advocacy
 - Role of technology
- e. Members from all workshops meet with their Director. Reports about the workshops are shared. Final assessment of the evaluation conclusions/recommendations are noted.
- f. Presentation in plenary of assessment results by representatives of each workshop.

With minor modifications of the texts the conclusions/recommendations of the evaluations were validated as relevant, recognizable, often applicable, and in any case useful to be exploited and further discussed during the coming conference debates, which indeed happened (cf hereafter: 7.4).

7. Meta-linkages

7.1 FROM BASIC PHILOSOPHY AND CORE VALUES TO PARTNERSHIP AND APPROACH

In fighting poverty, Woord en Daad and its partner organisations emphasize the importance of a biblical perspective⁴³. This biblical perspective provides them with a number of core values which are shared by all. The core values inspire the content of the work they do and also the organisational aspects of their work. The core values are regularly reviewed during conferences. During the Nairobi conference one core value was added to the list. The Woord en Daad core values are 'co-creation', 'co-responsibility', 'compassion', 'stewardship', 'interdependence', innovation'.

The core values, derived from the Bible, are operationalized in cross-cutting or thematic issues: *ownership, integrated approach, sustainability, partnership and leadership*. In the development jargon the latter concepts are well known. The difference between their use by Woord en Daad and by non-religious organisations, is that Woord en Daad links these concepts to an underlying religious value system, so that they obtain a charge which is more than heuristical, but inspired by religion. The religiously inspired cross-cutting issues are then guiding principles that have two applications: strategic application ('how do we operate?') and operational application ('what does this mean for our way of working and our programmes?').

The concept of partnership, on which the Woord en Daad co-financing construct is based, is also derived from biblical values. The definition is carried by the biblical word 'stewardship', which is operationalized in five interrelated concepts: *ownership, accountability, mutual trust, mutual respect and integrity*.

The challenge of partner conferences like the recent Nairobi conference is in the first place to establish and (re)confirm clarity and agreement on biblical principles and the core values that are shared together and guide the work (inspiration and interpretation) of each partner. Agreement and clarity are also to be gained about the cross-cutting issues and how these issues are translated in cooperation on a strategic level and on an operational level. The combination of these elements should lead to a common understanding of what development from a biblical perspective means to all partners in the Woord en Daad partnership. The process of coming to such understanding seems to be as important as the outcome.

The development perspective described above is a coherent framework of thinking inspired by belief. It adds a moral value to the work and to the partnerships which are the instruments of the intervention. This moral value is a binding force and a source of inspiration, solidarity and brotherhood between partners. It makes that the partnership is not merely a pragmatic means of fighting poverty, but also a goal in itself (Christian brotherhood). Whether the moral content of the work has any added value with respect to the quality or outcome of the work (translated into efficiency, effectiveness and impact) is not proved, and neither claimed. In the Education programme one finds expressions like 'Christian identity', 'Christian education', 'Christian norms and values', 'Christian life', with the underlying assumption that these concepts represent values which guarantee more

⁴³ Cf W&D policy note Biblical Principles for Development – Linking core values and cross-cutting issues as a framework for thinking (2009).

success than other values, or a lack of such religiously inspired values. We have already indicated above that it would be challenging to find out what Christian values in reality exactly are and what added value and impact they have on individual behaviour, on family and community life, and finally, whether they have an impact on the outcome of the fight against poverty⁴⁴. Such a search is recommendable.

Religiously inspired development strategies have much potential, in all continents⁴⁵. The civil society would be reinforced if religious groups together join other civil society organisations (women organisations, labour unions, etc.). Faith Based Organisations (FBO) should realize and exploit this potential force. But to have any impact and to become voices of change more critical mass is needed, and so more joint action (advocacy: to have one's voice heard!) in the society as religiously inspired development movement. In this context too, networking and association with others seem to be desired, with the underlying idea of disseminating well-tested ideas, so that these may have a wider impact on the society.

7.2 THE CHAIN APPROACH

Sponsoring schoolchildren and the development of VET has resulted in a wider vision of integrated development for poor communities, a formula that (more or less) fitted W&D's main occupations, interests and possibilities. The chain approach was developed and gradually adjusted and refined to fit the organisation's needs and those of its partner organisations⁴⁶. The key formula of the W&D chain approach is: 'from boarder to breadwinner'. The key elements of the W&D chain approach are:

- sponsorship of children from poor families to follow (Christian) primary education;
- possibilities for these (and other) children to continue schooling after primary school: ordinary secondary education or vocational education and training;
- facilitation of access of (non)graduated children to the labour market.

Additional elements in the chain approach are the following:

- distinction in the chain-strategy: direct poverty alleviation, development of civil society, policy influencing (added because of the requirements of the MFS format);
- embedding the (individual) chain trajectory in the social contexts of community and society;
- coupling of 'basic needs' to the chain.

The chain approach is very challenging, since it is a construct which is context-specific and combines perspectives of place (communities) and time (from child to adult), internal relations (various project components) as well as external relations (links with the labour market, the society at large), and covers different categories of interrelated target-groups (individual, family, community); it also combines the satisfaction of different kinds of needs of the various target categories in question. As such, the chain approach has the potential

⁴⁴ Norman Long's thesis was about the impact of Christian values and lifeworlds on development (Jehova's Witnesses in Zambia) – reference unknown. Norman Long was professor in Development Sociology in Wageningen.

⁴⁵ Cf Philomena Njeri Mwaura: Civic Driven Change – Spirituality, Religion and Faith; in Alan Fowler & Kees Biekart (ed) (2008) Civic Driven Change: Citizen's Imagination in Action. The Hague: Iss (see also www.iss.nl/cdc).

⁴⁶ Whether this effort was successful will be treated elsewhere (see following page).

to integrate all W&D programmes, and would represent as such the product of a coherent integrated development policy.

Apart from practical feasibility of the application of the chain approach, W&D is confronted with the question: *in our mission, do we want to adopt the chain model as the leading model of our intervention policy?*

Such an idea will have as consequence that in the interventions by the partner organisations (in the context of W&D programmes) the complementary elements of the chain model should be found back.

In answering the question “what could W&D and its partners learn from the three evaluations?”, the following remarks, in line with the evaluations, may be made.

1. In general

- a. The chain-approach, imperfect as it may be in theory and practice⁴⁷, combines the essential competencies of W&D for which it is known. As such, it contributes to W&D's *identity*. It would therefore be recommendable to further develop the model as a model or *theory of change*, and to investigate under which circumstances it can be implemented as an *integrated whole*. However, it should not be the exclusive W&D approach since it does not fit all circumstances, and neither do all of W&D 's core competencies fit in the approach.
- b. The main reason to consider adopting the chain-approach as an intervention model should be that it represents, in a given context, the best formula of intervention, creating optimal synergy between activities and producing optimal programme impact – it should give content to a *holistic* development approach centred on the ‘wholeness’ of man. In reality, this is not always the case (or possible).

In employing the chain-approach, a distinction should be made between the approach as a *conceptual model* and the approach as an *implementation directive*. In case of a model, one assumes that logical linkages between various kinds of activities (education, work and income facilitation, health and other) produce an added value, and that these linkages guide the design of intervention practice. In practice, in the local context, the complete model is not necessarily the most comprehensive or practical guideline for action. It might also be that certain elements of the chain approach are already taken care of by others (government, civil society organisations, etc.) so that a W&D partner can restrict its activities to one element of the chain only (e.g. education sponsoring). But in that case the model is still considered in the mind.

- c. It may be that the chain-approach is coherent in itself, but is (in most circumstances) not sufficient to serve as model for poverty reduction, since external factors play important roles which influence the fight against poverty. A *context analysis* should shed light on the total poverty-picture (other factors may become assumptions in the W&D chain intervention strategy).
- d. An ‘integrated’ chain approach whereby *individuals, communities and society* are linked in the chain-actions pre-supposes that the actions take place in a

⁴⁷ MED and SMED do not nicely fit in the chain approach, cf evaluation Job and Income programme.

geographically or socially restricted area. Only in such a situation, complementarity, synergy or win-win between activities may produce socio-economic impact⁴⁸.

- e. The applicability of the chain approach eventually depends on the context. Therefore, the context must be studied in order to find out whether a chain *theory of change* is relevant in this context. There is certainly a difference between urban and rural contexts. For a rural context, another (kind of) chain approach may have to be applied (based on livelihood approach?), with other parameters.

2. Specifically, considered from the evaluation of the individual programmes

- a. From the Job & Income Programme evaluation the idea emerges that 1. it would be desirable to apply more coherently the whole chain approach, and hence, to link MED and SMED better into the chain – considered from the TVET and JBC logic (and not necessarily from the MED and SMED logic)⁴⁹; 2. it would be desirable to embed the approach in a social context, and hence to provide more ‘holistic’ interventions, integrating education and basic needs interventions and make them more community-based. The interventions could be improved with more attention for linkages and lobby and advocacy. In chapter 5.2 of that evaluation several examples are given of opportunities for new linkages in the chain approach.
- b. From the Education Programme evaluation the idea emerges that 1. the chain approach is coherent in itself as it puts into perspective the function of education, and the need for follow-up (in the form of advanced training and facilitation to enter the labour market); 2. the chain approach is very relevant for the large group of children accessing education facilitated by the W&D programme – it provides them with a future perspective as if they were not poor and if opportunities were equal.
- c. From the Basic Needs Programme evaluation the idea emerges that 1. added value has to be sought more consciously and more strategically through complementarity – within the BN programme and also across the W&D programmes including the chain-approach; 2. one should therefore look for more win-win situations across programmes; 3. there are also situations in which POs fill niches in circumstances in which they can exploit comparative advantages; such situations are not necessarily fitting in the chain-approach.

All these points taken together it seems to us that the chain approach should be further developed, in theory and in practice, taking into account the following conditions:

1. Its relevance in the local context should be studied beforehand.
2. A *theoretical* chain-linkage between the three programmes should be worked out (on the basis of a context analysis). Various (but not necessarily all) W&D programme components must be linked in the chain approach in a sensible and mutually reinforcing or complementary way.
3. The economic, social and technical feasibility of its implementation in the local context should be determined. All components should be related to the same target entity (community, quarter).

⁴⁸ The J&I evaluation has found that MED and SMED as non-chain-linked programmes may achieve very good results. Therefore, it would not be valid to argue that positive impact ONLY occurs when the W&D activities are undertaken in a chain approach.

⁴⁹ This contrasting logics represent the fundamental ambiguity in Woord en Daad’s programme approach.

4. The capacity to apply the approach in most of its components must be considered; various components may be carried out by different organisations in a coordinated and complementary way (strategic alliances); a network approach should be considered. Complementarity may lead to win-win situations and to 'best practices' for all parties involved.
5. Professional competence must be available to be able to implement the approach in the best possible way.
6. The approach must be applied as a process, in a long term perspective.
7. From the very beginning the financial sustainability issue should be considered: how can the approach eventually generate its own operational funds?
8. The application of the approach should not necessarily be a strict rule, but as a principle the *intention* should be present to link activities maximally in a chainlike way (no isolated activities).
9. There are circumstances in which a chainlike approach is neither relevant nor desirable. Rural contexts perhaps need another (chainlike) approach than urban contexts. These other approaches should be found, studied, applied and tested by Woord en Daad (a livelihood approach?).

7.3 DEVELOPMENT OF THE PARTNER POLICY

The world changes rapidly and so do Woord en Daad's partner organisations in the South – the latter have become stronger through capacity strengthening, and more self-conscious. Moreover, Northern donors want to reinforce ownership of Southern partners and have a preference of funding PO directly (block grants), without passing (necessarily) via Dutch Co-funding organisations any more. These factors influence the partnership between Woord en Daad and its POs⁵⁰.

In short, the need for the creation of another form of organisation is caused by two forces:

1. Forces from within: the need to increase cooperation with likewise organisations and with specialised organisations, in order to increase quality, critical mass (economy of scale) and impact, and to develop relations with several donors at a time. The present evaluation has shown this need in all three programmes.
2. Forces from outside: donors want to fund PO directly, and target groups obtain funds directly from private donors. Because of modern technology, POs interconnect more easily, but also compete with each other and with the local private sector. In some countries there is increasing hostility from the government towards NGO's.

For Woord en Daad the challenge seems inevitable: "either we as Woord en Daad and POs will change in order to respond to the external changes, or otherwise we will become less relevant or even superfluous". Woord en Daad (during the Nairobi conference) has clearly stated to their POs that the current cooperation model is to be replaced by a network model, and that one-to-one relations between Woord en Daad and partners will disappear and be replaced by regional networks with a link to Woord en Daad. The critical change implies more ownership for Southern POs and mutual, equal responsibility for fundraising, decision making on utilization of funds as well as sharing experiences.

W&D says that while Northern organisations may have the money, Southern organisations have the capital, and this balances the partnership. Apart from funding, the exchange of knowledge and experience between (wider) networks of partners seems to

⁵⁰ The following issue is not covered by the three programme evaluations.

become more important and more urgent. Woord en Daad is inclined to think in the direction of more regional and thematic focus, with synergy between interventions and combined efforts by various parties. Such focus demands a vision on a region as well as a vision on what “belongs” to us or “fits” our competence, and what should be left to others, and whom?

A regional and thematic strategic alliance implies the pooling of expertise and capacity of a number of organisations (of various identity) that form a partnership *ad hoc*, for a particular, long-term programme. Of course, this partnership may grow into a lasting partnership. The mutual cooperation within the partnership demands attitudes and skills (in communication, sharing resources, creation of synergy, etc.) in order to create a real alliance. Such an alliance may solicit for funds with various donors. All this is new and challenging for the POs. Woord en Daad may be part of such an alliance (e.g. as knowledge broker), may support the alliance from a distance (e.g. facilitating *linking and learning*), or be uninvolved in the alliance. In the latter case the POs have, for certain “projects”, dissociated themselves from a direct link with Woord en Daad, thereby showing their independence. So there may be different forms of alliance between Woord en Daad and regional or thematic networks of POs and others - more formal, or less formal. Many details are still to be worked out, which will be the challenge for the coming months. But the foundation for Woord en Daad network alliances has been laid, in which Woord en Daad’s role changes from donor to facilitator of processes of linking and learning.

Woord en Daad partners have a number of starting trajectories of this kind: education in West Africa, education-primary healthcare-food security-rural skill training-enterprise development in East Africa, and more of such possibilities in Philippines, Sri Lanka and Bangladesh.

7.4 SINGLE-, DOUBLE- AND TRIPLE-STROKE LEARNING

To conclude this document, let us return to the objective of the evaluations, which was that they were to produce lessons learnt and applied in policy and implementation (cf. chapter 1). Having come at the end of the evaluation process, the question should be asked whether this evaluation has indeed resulted in lessons and whether these will indeed be applied. The partner-conference in Nairobi where many Woord en Daad staff and a significant representation of PO-staff was present “to join hands and hearts”⁵¹, has played a crucial role in the acceptance of the evaluation results and their application in the future Woord en Daad policy plan.

The evaluations agreed on the following characteristics of Woord en Daad:

- very developed, and partly formalised learning capacity of the organisation, which is also strongly promoted on partner-level;
- agreement on beneficiary policy level and consistent choice of (very) poor target-groups by the partner organisations;
- strong partner-bond, reinforced by common identity and religious inspiration;
- competent partner organisations whose capacity has been considerably developed in many fields with help of Woord en Daad;
- presence of a quite unique, explicit and clearly conceptualized ‘chain’-approach which (although not perfect in its application) has the potential of integrating the three main

⁵¹ The Nairobi Partner conference title was: ‘Joining Hands and Hearts’ – cooperation – ushirikiswaji – participation. Nairobi, Kenya, 25 March – 2 April 2009.

Woord en Daad programmes into a coherent development theory and development policy;

- the inclusion in the programme of the business sector and knowledge centres (in the Netherlands and in the partner's countries), and a research component, which opens new windows of multi-sectoral opportunities;
- systematic reflection on the future and readiness to consider fundamental changes in the organisation and its partner relationships.

The above points present a favourable point of departure for facing the results of quite fundamental and critical evaluations on programme level; the level of detail having been determined by the numerous questions in the Terms of Reference.

Critical points which came back in each of the three evaluations concerned:

- the (im)possibility or (un)desirability of linkage of all programmes in one (chain) approach;
- the question of insufficient financial sustainability of projects;
- 'holistic approach';
- the embedding of projects in their context (research needed);
- inclusion of more expertise and learning in projects (and consciousness with regard to 'best practices');
- linking, networking between partners and between partners and specialised institutions; new forms of mutual collaboration between partners and between partners and their 'outside world';
- more monitoring on outcome and impact level of projects and programmes;
- the role of advocacy on various levels;
- the organisation of the Woord en Daad data-base (on the basis of which programme evaluations are to be executed; the data-base has many shortcomings complicating the task of the evaluators).

As was mentioned before, all observations made by the three evaluations were discussed in workshop-form during the conference. The main conclusions of these workshops can be summarized as follows⁵². They concern points of departure, objectives and/or proposed innovations for the Woord en Daad 2011-2015 policy framework.

Basic Needs Programme

- Each programme needs to know its context. To realize this objective, POs have to be empowered.
- Woord en Daad and POs are committed to best practice. Ways have to be found to identify and share best practices and failures, and a quality system needs to be in place.
- Woord en Daad and POs want to invest in networks (local, national) where relevant.
- Woord en Daad and POs have a mutual responsibility for accessing external funding.
- From now on prevention must have demonstrable impact (e.g. behaviour change, less diseases).
- The following programme components have been chosen (not totally exclusive): health, food security, water and sanitation – mainstream as much as possible.
- In all programmes direct poverty alleviation, civil society strengthening and policy influencing, starting from community level, will be included.

⁵² The following points were derived from the conference workshop reports published on the conference "wiki".

- The communities will be educated to become final responsible stakeholders.
- Financial sustainability will be increased.
- Basic Needs activities will be linked with other aspects of the chain approach, either as complement or to mainstream.
- Wherever possible a family approach in HIV/AIDS will be followed.
- M&E and data collection capacity of POs will be enhanced.

Education Programme

- Main objective adopted: improvement of access to, and quality of education, which leads to poverty reduction and empowerment on individual, family and community/regional level.
- Five objectives: 1. empowerment of children/youngsters/adults, by applying acquired knowledge and skills for further education, for earning an income, for personal development, for responsible citizenship; 2. the education sector has been improved in the regions covered; 3. communities are empowered through involvement of parents and other actors (churches, government, etc.) in education; 4. local and regional government take their responsibility in education; 5. national governments are aware of their responsibility regarding education.
- The following innovations will be brought into the Education programme: a focus on training and capacity building of teachers; involvement of parents; development and inclusion of life skills programmes in education; contents of (Christian) education; focus on impact of education programmes; set-up of a knowledge programme.
- Specific attention in specific regions. In Latin America: working with youth related to gangs. In French speaking countries and Latin America: focus on pre-vocational (skills) education in primary schools. In French speaking countries: focus on target group of over-aged children (speed schools).

TVET Programme (Technical Vocational Education and Training) and JBC (Job and Business Centres):

- Main objective: Preparing and linking people effectively to the world of work.
- Six objectives: 1. increase of networking; 2. continuous increase of the quality of TVET; 3. continuous increase of the quality of JBC; 4. a distinction is made between wage- and self-employment; 5. increase of self-sufficiency of TVET/JBC; 6. improved linkages with other programmes.
- Three innovations: 1. business incubation and delivery of BDS; 2. development of various training delivery modes, e.g. mobile training, dual training, etc.; 3. development of a rural skills programme.

ED Programme (Enterprise Development):

- Slogans: Integrated approach through enterprise development; Stimulate sustainable business relationships – transform business practices.
- Main objective: Developing enterprises that empower different economic actors and which stimulate economic growth and reduce poverty.
- Three pillars: Chain organisation, Business Development Services, Financial interventions (Micro credit, Smed small, Smed, Equity).
- Four strategic issues:
 1. In order to enhance quality and innovation, POs will undertake systematic linking with sources of excellence (networking with other POs, collaboration with the government and other NGOs, more appeal on local specialists and professional institutions).

2. Interventions will be more embedded in the social context (community, society), and linked with Education, VET, JBC, MED and SMED (dependant on market conditions).
3. Outcome, effect and impact monitoring on project and programme levels will be reinforced.
4. The Chain approach as the major (not exclusive) *theory of change*.

These points prove that Woord en Daad and their partners, even before the final evaluation reports were finished, have reflected on, and approved almost all Recommendations, and intend to integrate them in their policy planning for the future. As such the learning processes (single, double and triple stroke) were jointly undertaken during the partner conference. More precisely, these learning processes implied:

Single stroke:

- For the Basic Needs programme: all points with respect to the improvement of the quality of the programme: embedding in context, learning from best practices, investing in networks, better application of the three strategies, educating communities, linking with other W&D programmes, improving M&E.
- For the Education programme: all points with respect to improvement of quality and access of educational systems, curricula and teachers, empowerment of youngsters and of communities, governments taking responsibility.
- For the TVET programme and JBC: all improvements with regard to networking, quality, linkages.
- For ED Programme: points with respect to enhancing quality: linking, collaboration, embedding in context.

Double stroke:

- For the Basic Needs programme: new insight: both W&D and PO looking for external funding (= change in organisational/programmational principle); impact must be shown (from input-output to result-oriented monitoring), increasing financial sustainability (= change of vision), linking to chain approach (more holistic view), family approach in HIV/Aids (=insight).
- For the Education programme: inclusion of life skills (= innovation), focus on result/impact orientation (= innovative monitoring/M&E), new focuses (= innovation).
- For the TVET programme and JBC: new training delivery modes, rural skills programme (= innovation).
- For the ED programme: outcome/impact orientation (= innovative monitoring/M&E).

Triple stroke:

This concerns the mission of Woord en Daad, the kind of organisation it wants to be, the core values it embraces – the development of new principles with which Woord en Daad intends to shift to a next phase.

In section 7.3 (above) it was argued that the need for the creation of another form of organisation is caused by two forces:

- Forces from within: the need to increase cooperation with likewise organisations and with specialised organisations, in order to increase quality, critical mass (economy of scale) and impact, and to develop relations with several donors at a time. The present evaluation has shown this need in all three programmes.
- Forces from outside: donors want to fund PO directly, and target groups obtain funds directly from private donors. Because of modern technology, POs interconnect more

easily, but also compete with each other and with the local private sector. In some countries there is increasing hostility from the government towards NGO's. Etcetera.

During the partner conference *Woord en Daad*, together with all its partner organisations have voted for a new organisational *Woord en Daad* set-up: a network-organisation linked together by global, regional and thematic alliances.

Although many details have to be worked out, it can be stated that such a fundamental organisational shift will facilitate:

- The further reinforcement of the ownership of projects and programmes by Southern partners; equality in policy formulation; equal responsibility in fundraising, decision making on utilization of such funds.
- Relocation of decision-power to the South.
- Direct donor-funding of regional and/or thematic networks.
- Reinforcing South-South knowledge-transfer; networking between PO.
- Shift of the main role of *Woord en Daad* as donor to that of a facilitator of processes of linking & learning.
- The linking of PO with other kinds of collaboration: with enterprises and knowledge centres; innovative collaboration and alliance.

All the above mentioned learning processes have to be confirmed and completed in the implementation of a future policy plan.

7.5 FINALLY

In the sections above several processes were highlighted: evaluation, validation and learning processes, which all came together during the partner conference in Nairobi. During that conference, the past, the present and the future almost coincided, which made it, for the evaluators, *almost* possible to evaluate not only past and present but also the future such as this future was proposed for the three programmes and the organisation of *Woord en Daad* as a whole during the various fora. *Almost*, as we have abstained from such a prophetic task. Although our involvement in *Woord en Daad* grew ever stronger during the evaluation process (especially during the partner conference), it had to stop, and stopped (rightfully) during that conference, from where we left when it was halfway its proceedings: *non plus ultra!* It is now the task of *Woord en Daad* and its partner organisations to realize the good intentions which they have jointly formulated during the conference, and thereby complete the learning process. We wish all of them good luck with this ambitious, innovative undertaking.

