KOHA-PICD
Kaihono hei Oranga Hapori o te Ao -
Partnerships for International Community Development

Organisational Reviews
2009-2010

Lessons learned for the NGO community

Hilary Smith
Stephen Haslett

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We would particularly like express our gratitude to the staff in their overseas partner organisations and the community members we met during review field visits to Nepal, Vanuatu, Timor-Leste and Thailand.

In addition, we would like to acknowledge the organisations visited in previous years; their insights and experiences also contribute to this year's Lessons Learned report.

Hilary Smith
Stephen Haslett

Systemetrics Research Associates Ltd
Palmerston North
www.systemetrics.co.nz

Cover picture Tanvir Alam, pupil at Madarsha Tajbidul Kuran, Gaighat, Udaypur, Nepal. Minority ethnolinguistic groups in Nepal are now being encouraged to use their languages for primary education, as in this school supported by Save the Children New Zealand.

(*Photo:* Hilary Smith)

Abbreviations

CID	Council for International Development: Kaunihera mō te Whakapakari Ao Whānui
HAF	Humanitarian Action Fund
KOHA (or KOHA-PICD)	Kaihono he Oranga Hapori o te Ao - Partnerships for International Development (formerly VASS) 2006-2010.
NDRF	NGO Disaster Relief Forum (a committee of CID)
NGO	Non-government organisation
NZAID	New Zealand's International Aid and Development Agency (a semi autonomous body established in 2002 within the Ministry of Foreign Affairs and Trade, disestablished in 2010)
PMC	Programme Management Committee of KOHA-PICD
VASS	Voluntary Agency Support Scheme (developed into KOHA-PICD in 2006)
SIL	Summer Institute of Linguistics
MDGs	Millennium Development Goals
EFA	Education for All

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Summary

The KOHA-PICD scheme (Kaihono hei Oranga Hapori o te Ao - Partnerships for International Community Development), often called KOHA, was developed in 2006 as a co-funding scheme with NZAID (New Zealand's International Development Agency) and New Zealand non-government organisations (NGOs) to support overseas community development. It was replaced by the Sustainable Development Fund in July 2010. The sister Humanitarian Action Fund (HAF), for emergency response work by New Zealand NGOs, was replaced by the Humanitarian Response Fund.

KOHA organisational reviews aimed to confirm the compliance of the organisations with the scheme's criteria and requirements, and their capacity to meet KOHA standards. They also aimed to assist the organisations to improve their work with partners in the field by identifying general areas of learning. The reviews assessed progress made against the recommendations of the organisation's last review, made suggestions to NZAID and the PMC (Programme Management Committee) about how the scheme could be improved, and identified lessons that could be shared with the wider NGO community in Aotearoa New Zealand.

In this report we present some generic lessons, identified through discussions with the organisations, their partners, and the PMC, for the consideration of the wider NGO sector involved in overseas development. Some of the issues were highlighted in Lessons Learned reports from the reviews in previous years, but we have included them again this year to emphasise their ongoing importance.

Lessons learned

Lessons about implementation of the Treaty of Waitangi

1 Organisations which are exploring their commitments to the Treaty of Waitangi should consider the overseas part of their work as part of the journey.

2 The NGO community should seek input from relevant tangata whenua organisations to develop ideas for operationalising their commitment to The Treaty of Waitangi.

Lessons about organisational history

3 Organisations should ensure that people in governance, staff and membership have a good understanding of the foundation of their own organisation, so that the context of future planning is clear.

Lessons about sector knowledge

4 Organisations need to be aware of required expertise in sectors such as health, education or agriculture, and ensure that they have access to the advice necessary to inform programme decision-making.

5 Programme officers need to ensure that they are aware of best practice in the sectors in which they are working.

Lessons about language

6 Organisations involved in education need to be aware of the language issues relevant to the countries in which they are working.

7 Organisations need to be aware of and address the language issues relevant to their work with partners.

Lessons about monitoring and evaluation

8 Organisations should use sound participatory methodologies for the collection and use of monitoring and evaluation data, to ensure relevance and the necessary community involvement.

Lessons about organisational travel

9 Organisations should have clear procedures for the recording of contact information when staff or others are travelling overseas.

1 Introduction

1.1 The KOHA-PICD and HAF schemes

The KOHA-PICD scheme (Kaihono hei Oranga Hapori o te Ao - Partnerships for International Community Development), often called KOHA, was a co-funding scheme with NZAID (New Zealand's International Development Agency) and New Zealand non-government organisations (NGOs) to support overseas community development. It developed out of the VASS (Voluntary Agency Support Scheme), established in 1974, and was administered by a Programme Management Committee (PMC) made up of elected NGO peers, the NZAID Programme Manager (Civil Society), and an independent chairperson. In July 2010 it was replaced by the Sustainable Development Fund.

The aims of the KOHA-PICD scheme were outlined in the KOHA Handbook. The Handbook stated[1] that the purpose of the scheme was "to improve the lives of people in developing countries by addressing poverty and injustice internationally, through overseas community development projects and programmes supported by New Zealand NGOs".

The HAF (Humanitarian Action Fund) was a sister scheme to KOHA, designed to support the international humanitarian work of New Zealand NGOs. Funding was supported for emergency prevention and preparedness, emergency relief and rehabilitation, and reconstruction projects.[2] It was managed by the KOHA-PICD PMC, with the addition of the vice-chair from the NGO Disaster Relief Forum (NDRF). The HAF fund has been replaced by the Humanitarian Response Fund.

1.2 Organisational reviews

Each year the PMC selected a number of organisations participating in the scheme for organisational reviews[3]. KOHA-PICD organisational reviews aimed to confirm the compliance of the organisations with the scheme's criteria and requirements, and their capacity to meet KOHA standards. They also aimed to assist the organisations to improve their work with partners in the field by identifying general areas of learning The reviews made recommendations to strengthen compliance and quality of systems, or refer significant issues and concerns to the PMC. In addition, they assessed progress made against the recommendations of the organisation's last review, made suggestions to NZAID and the PMC about how the scheme can be improved, and identified lessons that could be shared with the wider NGO community in Aotearoa New Zealand.

The Terms of Reference for the 2009-2010 reviews are attached as Appendix 1. We reviewed four organisations: Mahitahi: Catholic Overseas Volunteers, Save the Children New Zealand, Oxfam New Zealand, and CBM New Zealand. The reviews included visits to partners and communities in Nepal, Vanuatu, Timor-Leste, and Thailand.

1.3 The "lessons learned for NGOs" component

The KOHA-PICD organisational reviews aimed to be a participatory process involving the NGOs being reviewed, their partners, the PMC and NZAID. Reviews were regarded as an opportunity to learn and incorporate that learning into future practice. As in previous years, areas of learning specific to the organisations reviewed in 2008-2009 were discussed in the confidential organisational reports.

The generic lessons - which we have identified through discussions with the organisations, their partners, and the PMC - are presented in this report for the wider NGO sector involved in overseas development to consider. Some of the issues have been highlighted

1 KOHA Handbook (2008), p. 12.
2 HAF Handbook (2009), p. 8.
3 KOHA Handbook (2008), pp. 80-85.

in Lessons Learned reports from the earlier reviews, and we have included them again this year to emphasise their ongoing importance. Consequently, as well as lessons from the four organisational reviews we undertook in 2009-2010, this report includes important aspects from earlier organisational reviews.

1.4 Reviewers

Dr Hilary Smith and Dr Stephen Haslett of Systemetrics Research Associates Ltd[4] served as contracted reviewers for the 2009-2010 reviews.

[4] See http://www.systemetrics.co.nz

2 Lessons about implementation of the Treaty of Waitangi

All NGOs which are members of the Council for International Development (CID) have signed up to a commitment to the Treaty of Waitangi/te Tiriti o Waitangi, as part of the CID Code of Ethics[5]. The organisations we have reviewed have been aware of this commitment, but have often identified difficulties in its operationalisation, particularly as it applies to their overseas work. Although most organisations have started on the "journey" outlined in *Treaty Journeys: International Development Agencies Respond to the Treaty of Waitangi* (2007)[6], there appears to be little available as a resource to guide them when they wish to apply their commitment to their international programmes.

Since we have been involved in discussions about the implementation of the Treaty of Waitangi in international development over a number of years with various NGOs, this report includes as Resource 1 an exploration of ideas which have come up at various times in our discussions with NGOs. This is offered as starting point, but needs further input and discussion, particularly from tangata whenua, since it was beyond the scope of this report[7].

Lessons

1 Organisations which are exploring their commitments to the Treaty of Waitangi should consider the overseas part of their work as part of the journey.

2 The NGO community should seek input from relevant tangata whenua organisations to develop ideas for operationalising their commitment to the Treaty of Waitangi.

5 Available from: http://www.cid.org.nz

6 Available from: http://www.cid.org.nz

7 We would like to acknowledge the valuable input provided through consultation with Dr Lesley Batten, Research Centre for Maori Health and Development, Massey University.

RESOURCE 1

The Treaty of Waitangi and Overseas Development work by NGOs: An exploration of ideas for implementing the commitment

This list of ideas does not aim to be comprehensive, but rather a record of ideas which have been raised in discussions with NGOs from Aotearoa New Zealand, particularly in relation to the KOHA fund. It frames these according on the principles of the Treaty of Waitangi (te Tiriti o Waitangi) as outlined in *He Tirohanga ō Kawa ki te Tiriti o Waitangi: A guide to the Principles of the Treaty of Waitangi as expressed by the Courts and the Waitangi Tribunal* (2001)[8]. This is a full discussion which can be accessed through the internet, but we acknowledge that the principles were developed for Crown agencies, and that there are other useful frameworks of Treaty principles[9]. However, we are hopeful that the ideas below result in similar sets of ideas relevant to international development.

It is important to note that for the most part this discussion has been developed by Pākehā, as we are from Pākehā backgrounds and the NGOs we have visited have been overwhelmingly Pākehā in organisational culture. An essential next step is to get Māori perspectives for further development of these ideas, but this is beyond the mandate of the current report.

The starting point for this discussion is the commitment outlined in Sections 1(f) and 2(c) of the Code of Ethics for the Council for International Development Kaunihera mō te Whakapakari Ao Whānui (CID) www.cid.org.nz:

Section 1:Principles

(f) The Treaty of Waitangi is fundamental to development in Aotearoa/New Zealand, and to our perspective of development issues internationally.

Section 2: Ethics

A member of the Council commits itself to:

(c) Recognise the bi-cultural basis of Aotearoa New Zealand society and be committed to fostering the spirit and upholding the principles of the Treaty of Waitangi.

This commitment has been addressed in a number of resources, and particularly developed in two documents which are available for download from the CID website:

- *Treaty of Waitangi Resource Manual* (n.d.) (A chapter of the CID Resource Kit)
- *Treaty Journeys: International Development Agencies Respond to the Treaty of Waitangi* (2007).

The current resource attempts to follow on from the information and discussion expressed in those two documents.

The following framework is organised into three parts. We suggest that organisations need to address all three areas in order to fulfil their commitment to the Treaty of Waitangi:

1 Application: The organisation in Aotearoa NZ

The first is a summary overview of some of the ways organisations may address their commitment to the Treaty. These changes are usually embarked upon as the outcome of workshops on the Treaty of Waitangi with expert facilitators.

2 Application: Overseas work

This is the way in which a commitment to the Treaty can be implemented in an organisation's overseas work. This is a first attempt to addressing the need for operationalisation of this area, which as far as we are aware has not been developed in any depth to date.

3 Extension: Approach with overseas partners

Some organisations have expressed their commitment under the Treaty in terms of it underpinning their approach with overseas partners in international development.

[8] Downloadable from Te Puni Kōkiri (Ministry of Māori Development), http://www.tpk.govt.nz.

[9] Also popularly used is the "Partnership, Protection, Participation" framework developed for the health and social policy sector: Royal Commission on Social Policy. (1988). *The April Report.* Wellington: Author.

IDEAS FOR IMPLEMENTING A COMMITMENT TO THE TREATY OF WAITANGI/TE TIRITI O WAITANG				
Principles[10]		**Application: The organisation in Aotearoa NZ**	**Application: Overseas work**	**Extension: Approach with overseas partners**
Partnership	• The duty to act reasonably, honourably, and in good faith	• Acknowledging the organisation's current position in relation to tangata whenua. • Developing organisational governance and operational capacity in order to be able to develop partnerships with Māori, e.g. Kaumātua, advisory groups. • Developing working relationships with relevant tangata whenua groups and key people. • Finding out the relevant/related issues for Māori, e.g. in education, health, disability, and how these are being addressed.	• Making sure the organisation is represented overseas as coming from a country which has a bicultural foundation, e.g. in publications/correspondence/discussions with overseas sister organisations, in international forums, and with partners. • Forging links with Māori groups to encourage participation in the overseas development mandate of the organisation, e.g. by including fundraising and awareness-raising activities and approaches likely to appeal to Māori groups/members. • Making links in marketing/awareness-raising materials between the overseas work and NZ/Māori contexts.	• Being clear and transparent to overseas partners about the NZ organisation's aims and objectives, and explaining any constraints. • Ensuring staff are aware of culturally appropriate ways of behaving in interactions with overseas partners and communities. • Working for community ownership of projects and programmes. • Sharing details whenever appropriate about how funding is raised, the donors who contribute, etc. • Sharing relevant knowledge/learning from the Aotearoa NZ context.
	• The principle of reciprocity	• Where the organisation has a NZ programme, addressing the relevant issues for Māori in appropriate ways as determined by Māori partners. • Developing new ways of working to ensure links with and participation from Māori, getting advice if necessary.	• Providing an opportunity for tangata whenua to increase links and liaise about the development issues for other indigenous communities, e.g. through project visits by Māori people (possibly as a fundraising/awareness-raising activity). • Ensuring that visits from overseas partners include an opportunity for meaningful engagement with Māori partners working on similar issues.	• Providing overseas partners an opportunity to visit the NZ organisation, e.g. for short-term exchanges, study visits, lecture tours. • Working with overseas partners to increase awareness of development issues as required, e.g. gender, environment, disability, ethnic minorities.
	• The principle of mutual benefit	• Sharing theoretical frameworks and approaches for intervention with Māori who are engaged in parallel fields of development, e.g. health, education.	• Including Kaumātua and/or other Māori involved in the organisation (e.g. in governance or operational roles) in field visits to facilitate deeper relationship-building with overseas partners.	• Discussing ways in which overseas partners can contribute meaningfully to the NZ organisation, e.g. through sharing of their development approaches and successes.

[10] *He Tirohanga ō Kawa ki te Tiriti o Waitangi: A guide to the Principles of the Treaty of Waitangi as expressed by the Courts and the Waitangi Tribunal* (2001), www.tpk.govt.nz.

Active protection	e.g. Taonga such as te reo Māori, land.	• Resourcing all staff to be confident in the correct pronunciation of te reo Māori. • Analysing staff ability in te reo Māori, and developing a plan for the use of te reo Māori in the organisation[11]. • Using te reo Māori in publications, e.g. producing bilingual resource materials.	• Including of the use of te reo Māori e.g. in bilingual logos, greetings, document headings. This would be as a symbolic recognition rather than for reasons of "simple" communication. (Most overseas partners are used to multilingual communications and unlikely to be fazed by this).	• Ensuring that partners can communicate easily, e.g. by providing interpreters for spoken interactions, paying for translations of reports/summaries, etc. • Encouraging (and if necessary funding) a focus on environmental sustainability, e.g. in office/organisational processes.
Redress	Past wrongs have right of redress.	• Recognising ways in which the organisation may not have worked with Māori adequately in the past, or recognised issues sufficiently well, and planning for ongoing engagement with Treaty issues. • Collecting and analysing ethnicity data of staff, and planning for changes if Māori staff are under-represented or unevenly represented throughout the organisation. • Developing organisational tikanga/protocols that both Māori and Pākehā/tauiwi staff are comfortable with. • Resourcing all staff in awareness of the Treaty and its relevance to them and the organisation, appropriately according to their own backgrounds, levels of awareness, etc.	• Encouraging/developing ways for Māori participation in overseas representation of the organisation, e.g. in international governance if the organisation is part of an international NGO, as volunteers, etc. • Resourcing both Māori and Pākehā staff to speak confidently to overseas partners about the Treaty of Waitangi and the organisation's commitment to the Treaty.	• Identifying and focusing on the social justice and human rights dimensions to projects/programmes., i.e. through appraisal, identification, monitoring and evaluation processes. • Encouraging planning to address indigenous issues and grievances, through collecting ethnicity data, focus of programmes, etc. • Including indigenous minority groups in programmes wherever possible.

[11] A comprehensive and user-friendly set of workshop resources is available for download from the Māori Language Commission at http://www.tetaurawhiri.govt.nz: *Whakawhanaungatanga: A Coordinated Approach to Māori language planning.* (2004).

3 Lessons about organisational history

It is axiomatic that each NGO has its unique history and background. The NGOs we reviewed have rich and interesting histories from the time they were established until the current day, often with charismatic and inspirational founders. This background results in each organisation taking a particular niche in the NGO development sector. Some historical notes for the organisations reviewed in 2009/10 are given in the figure below.

It is important that there is an organisational culture which encourages knowledge of the background of the organisation, so that its particular mandate in international development is well-understood by everyone in the organisation. If this does not occur, the organisation may lose its direction, and could end up losing its specialist area within the development sector, along with membership and support.

It is also important that members in both the governance and operational parts of the organisation acknowledge and understand turbulent patches in the organisation's history, both internationally and locally, and how they were resolved. This should help ensure that similar episodes do not recur.

Figure 1 Historical notes for some New Zealand NGOs

The founder of the Christian Blind Mission (CBM) was Ernst Jakob Christoffel, a German pastor who founded the Christian Mission for the Blind in 1908 to build homes for blind and disabled children and adults in Turkey[12]. The organisation was Christoffel-Blindenmission (Christoffel Blind Mission) in honour of the founder after his death in 1955.

Photo: http://www.cbm.org (14/04/10)

Mahitahi grew out of the Catholic Overseas Volunteers Service (COVS), which was started in the early 1960s as part of the international volunteering movement of that era, e.g. John F.Kennedy's establishment of the American Peace Corps in 1961[13]. The added dimension for Catholic volunteers was the history of church missionaries from Europe working in the Pacific from the early nineteenth century, including Bishop Jean Baptiste Francois Pompallier who arrived in Hokianga in 1838.

Photo: http://www.nzhistory.net.nz (08/09/10)

12 www.cbm.org (14/04/10); email from CBM NZ (19/05/10).

13 Although as Keren Clark describes, the origins of the volunteering movement actually go back to the post-war experience of international service of student groups, government and church groups in the 1940s. Keren Clark (1978), *The two-way street: A survey of Volunteer Service Abroad*, New Zealand Council of International Research.

In 1942 the Oxford Committee for Famine Relief was founded by "a group of Quaker intellectuals, social activists and Oxford academics" in Britain, to campaign for food supplies to be sent to starving women and children in enemy-occupied Greece during World War II[14].

Photo: http://www.oxfam.org (07/09/10)

The Save the Children Fund was founded in Britain in 1919 by Eglantyne Jebb to supply food to children in Austria and Eastern Europe who were starving from blockades after the World War I[15]. She wrote the first Declaration of the Rights of the Child in 1923, which was adopted by the League of Nations in 1924. This eventually developed into the United Nations Convention on the Rights of the Child (CRC), adopted in 1989.

Photo: http://www.savethechildren.org.nz (20/01/10)

Lesson

3 Organisations should ensure that people in governance, staff and membership have a good understanding of the foundation of their own organisation, so that the context of future planning is clear.

14 http://www.oxfamamerica.org/whoweare/pages/faq#history1 (accessed 31/01/10).
15 http://www.savethechildren.org.nz/alliance/about_us/history.html (accessed 19/0110).

4 Lessons about sector knowledge

Most NGOs in New Zealand are too small to have staff who are specialists in both the geographical areas and the development sectors in which they are working. Programme officers are generally allocated according to geographical regions, and responsible for the administration of projects in a number of sectors such as health, education, or agriculture.

EXAMPLE

Girls' Education and Gender Equality

A number of organisations have projects focusing on girls' education, as this is important part of both UNESCO's Education for All (EFA)[16] goals and the United Nations' Millennium Development Goals (MDGs)[17]. The focus has often been on girls' enrolment in school.

However, in some regions such as the South Pacific, girls are beginning to outnumber boys in school. This does not necessarily mean that girls will have better economic futures than boys, but rather that the education system may be becoming less relevant for boys. Although some boys may join maritime colleges or family businesses in agriculture or fishing, a large number are in neither training nor employment.

This means that some projects which focus solely on girls' enrolment as an indicator of gender equality may be in danger of missing the point[18] NGOs which are involved in education projects need to be aware of the issues around this increasing problem.

It is important that organisations have systems to ensure that there are ways for their programming to be informed by best practice in the sectors in which they work. They need to develop appropriate models such as advisory or reference groups in order to ensure their sector-related knowledge remains up-to-date and relevant.

Lessons

4 Organisations need to be aware of required expertise in sectors such as health, education or agriculture, and ensure that they have access to the advice necessary to inform programme decision-making.

5 Programme officers need to ensure that they are aware of best practice in the sectors in which they are working.

16 http://www.unesco.org/en/efa

17 http://www.un.org/millenniumgoals

18 For a discussion on girls' and boys' education, see Tembon, M. & Forst, L. (2008). *Girls' Education in the 21st Century: Gender Equality, Empowerment and Economic Growth.* The World Bank. Downloaded from http://siteresources.worldbank.org/EDUCATION/Resources/278200-1099079877269/547664-1099080014368/DID_Girls_edu.pdf (14/07/10).

5 Lessons about language

Language issues are relevant in a number of ways to work with partners in international development work. This seemingly obvious fact is often overlooked by organisations coming from an English-dominant country such as New Zealand, whose partners can generally speak English.

5.1 Language-in-education policy

A crucial area for education projects is language-in-education policy. Evidence internationally is absolutely incontrovertible that children best achieve literacy and numeracy when they are taught in a language they understand, i.e. their mother tongue. This will also allow for the children's most effective acquisition of a second language, such as English, in later primary education. Resource 2 gives an overview of the key issues, from an analysis by the World Bank in relation to the Education for All (EFA) goals[19].

5.2 Language and development goals

Language issues are also important in other areas of development work. It is vital that materials are translated wherever necessary to ensure good communication. Resource 3 is an summary from the Summer Institute of Linguistics (SIL) of the ways in which local languages need to be considered for the achievement of all eight of the Millennium Development Goals (MDGs)[20].

Lessons

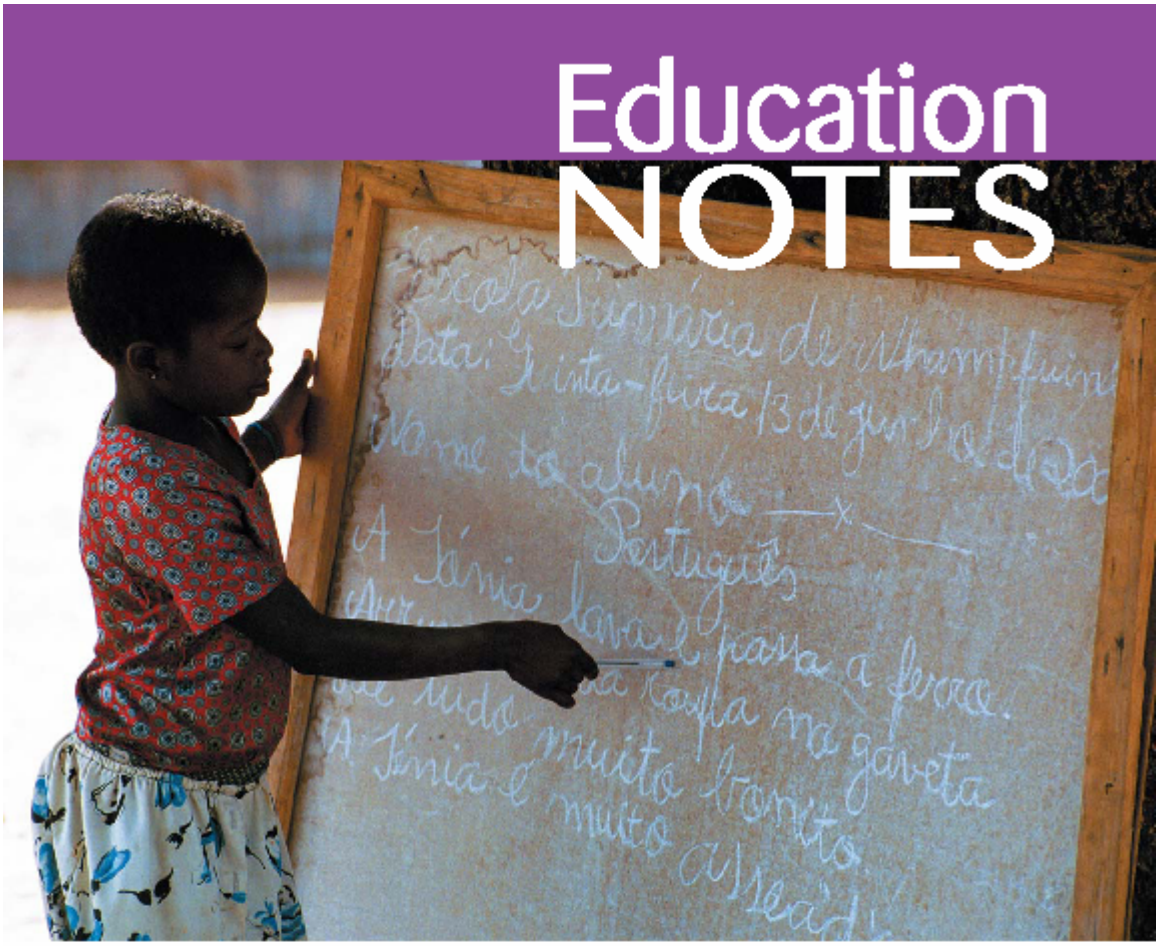
6 Organisations involved in education need to be aware of the language issues relevant to the countries in which they are working.

7 Organisations need to be aware of and address the language issues relevant to their work with partners.

[19] http://www.unesco.org/en/efa
[20] http://www.un.org/millenniumgoals

RESOURCE 2

Source: http://siteresources.worldbank.org/EDUCATION/Resources/Education-Notes/EdNotes_Lang_of_Instruct.pdf (Retrieved 05/09/10)



In Their Own Language…Education for All

Fifty percent of the world's out-of-school children live in communities where the language of schooling is rarely, if ever, used at home. This underscores the biggest challenge to achieving Education for All (EFA): a legacy of non-productive practices that lead to low levels of learning and high levels of dropout and repetition. In these circumstances, an increase in resources, although necessary, would not be sufficient to produce universal completion of a good-quality primary school program.

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That children learn better

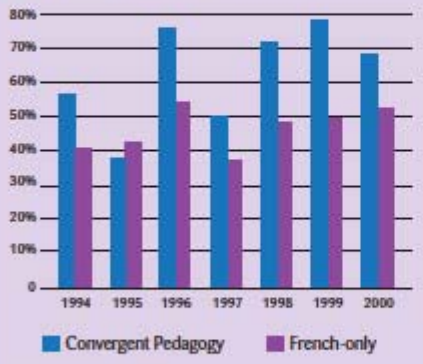
if they understand the language spoken in school would seem an obvious observation—and indeed, it is borne out by study after study. Even where an important goal of schooling is for children to learn a second language, this too is facilitated by starting with a language children already know. Research provides convincing evidence that a second language is learned best when a first language is learned well. In the late-exit bilingual model, children learn to read in the language that they speak at home, with a second language introduced in the early grades. Instructional time in that language then increases gradually.

Benefits of the Use of First Language Instruction

First language instruction results in (i) increased access and equity, (ii) improved learning outcomes, (iii) reduced repetition and dropout rates, (iv) socio-cultural benefits and (v) lower overall costs.

Increased access and equity. Bilingual programs have generally been instituted in rural areas, among more marginalized populations. They have been widely shown to help those children stay in school longer, reach higher levels of education overall and increase social mobility.

Chart 1: End-of-primary Examination Pass Rates, 1994-2000



Source: Bender, 2005.

Improved learning outcomes. In Mali, end-of-primary pass rates between 1994 and 2000 for children who transitioned gradually from a local language to French were on average 32% higher than for children in French-only programs (see Chart 1).

The use of a language that children understand allows teachers to use more active and more effective teaching methods. Supporting mastery of the first language promotes the cognitive development needed to more easily learn a second language. In Brazil, for example, first language teaching has been linked to better acquisition of literacy skills. Several independent studies with indigenous populations have demonstrated that the use of children's home language has been successful in raising levels of literacy in the local language and the national language (Portuguese), as well as raising achievement levels in a variety of academic subjects. In Burkina Faso, children with initial literacy in the Mooré language before beginning instruction in French achieved better results in French and mathematics than students who had only participated in French-language schooling. The use of local languages also ensures that the knowledge children bring to schooling is used as a basis for further learning.

Reduction of repetition and dropout. In Mali, where about 10% of primary school children are in classrooms that use first languages as languages of instruction; these children are 5 times less likely to repeat the year and more than 3 times less likely to drop out of school. In bilingual schools in Guatemala, covering about 15% of the population, grade repetition is about half that of traditional schools, while dropout rates are about 25% lower. These results are all the more significant because children receiving instruction in first languages are often from more at-risk populations.

Socio-cultural benefits. The use of local languages for instruction often leads to inclusion of more local content in the curriculum and greater participation of parents and community members as classroom resources. Parents are better positioned to become involved in the school and to feel that their knowl-

edge and their culture are valued. The legitimization of local languages that comes from their use in schooling can strengthen children's, families' and communities' sense of inclusion in schooling. The use of local languages in formal education has a positive impact on adult literacy as well. As parents see their children successfully learn to read and write in their own language, the parents are often motivated to attend literacy classes as well.

Lower Costs. The financial benefits of the use of local languages in education derive largely from decreases in repetition and dropout. In the few cases where these benefits have been calculated, the savings have considerably outweighed the incremental costs of establishing and maintaining schooling in local languages (production of learning materials, teacher training, etc.). In Mali, for instance, a World Bank study found that French-only programs cost about 8% less per year than mother-tongue schooling, but the total cost of educating a student through the six-year primary cycle is about 27% more, largely because of the difference in repetition and dropout rates. Similar benefits have been found in Guatemala (see Table 1).

Table 1. Simulated Cost Savings and Benefits as a Result of Reduced Repetition and Dropout Due to PRONEBI

	PRONEBI	Traditional
Repetition Rates (1991)	.25	.47
Annual Unit Costs	Q 246	Q 235
Number of Indigenous Students (1991)	96,194	653,413
Total Cost of Repetition	Q 5,892,005	Q 72,169,440
Simulated Savings Due to PRONEBI		Q 32,147,955
Dropout Rates (1991)	.13	.16
Simulated Decrease in Dropouts Due to PRONEBI		3,927
Simulated Annual Incremental Earnings Due to PRONEBI		Q730,422

Source: World Bank, HCO Dissemination No 60, October 1995.

If It Works So Well, Why Isn't Everyone Doing It?

Many developing countries have been reluctant to adopt a policy of delivering basic education in local languages. Donors have also not given high priority to such policies and in some cases have actively opposed them. Governments have cited goals such as the reduction of ethnic tensions and national unity as reasons to use foreign languages in education, although there is limited support in recent history for the unifying role of a single national language in a multilingual country. Other countries have decided to use several or even all of their national languages in order to avoid internal conflict. For example, upon independence, the Government of Eritrea committed to providing public education in all of its languages, in part to avoid internal disunity.

A more pressing obstacle to the use of local languages in schooling has to do with high development costs and weak implementation capacity. In many developing countries, materials in even one language are scarce, which leads to an understandable reluctance to try to publish books in several languages, where it is harder to achieve economies of scale. Yet technologies like desktop publishing are changing the situation. Papua New Guinea, for instance, has published materials in hundreds of languages by using a basic 'shell book' format. As of 2000, the country was using 380 languages in schooling. The Democratic Republic of the Congo has long published materials in the four languages which are regional *lingua franca*. Mali is currently providing education in 11 languages with materials made available in each language.

A further challenge is that where there are many languages, formerly centralized approaches to teacher development and deployment will need to be modified. To address this challenge, countries can decentralize the recruitment of teacher candidates and pre- and in-service teacher training can also be managed regionally rather than centrally.

Another obstacle is that parents and teachers may resist the use of the mother tongue as a language of instruction. In Mexico, researchers have found that some parents who speak Triqui believe that Spanish

is more important in school because it is the "language of progress." Similarly, in Haiti, many parents resist the use of Creole as the language of instruction because the mother tongue is thought to be the language of the poor and the oppressed. A campaign to explain language policy and its benefits is an essential part of any solution but ultimately, resistance will continue unless the education system is designed to value what children themselves bring to the learning process. Further, parents who hesitate to send their children to a mother tongue-medium classroom are often convinced of its value when they see children in the bilingual program outperforming their official-language counterparts by the end of the 4th grade—in the official language.

Resistance will continue unless the education system supports the use of local languages in several ways: ensuring a constant supply of appropriate textbooks and other materials, training teachers in the benefits of using local languages for instruction as well as in appropriate methods, and ensuring that high stakes examination systems reward the skills in which children instructed in local languages excel (i.e. redesigning exams to emphasize reading, writing and problem solving, not just extensive memorization of second language texts). Mali, for instance, overcame some teacher resistance by designing the reform to include (i) teacher training in active and effective teaching methods, (ii) a transfer to the second language in the early grades and (iii) changing examination policies and ensuring 'quick wins' for teachers, students and parents. Literacy classes for adults can also reduce parental reluctance and provide legitimacy for local language.

Lessons Learned

The use of first languages as languages of instruction can contribute to the attainment of EFA goals and should be a part of the World Bank's dialogue with educators and policy-makers. Particular attention should be paid to the following issues:

- Policy formulation around language of instruction issues and successful implementation require political commitment and the support of parents and community members.
- Bilingual programs are most successful where the goal is to make children literate in their first language and also to acquire fluency in the second (usually the former colonial) language; these should not be either/or propositions.
- The policy environment of language reforms must be carefully managed, with significant training and planning, to include:
  - Consensus building and awareness campaigns among teachers, parents and NGOs;
  - Professional development for teachers;
  - Curriculum and teaching materials development and consistent provision of high or equivalent quality materials at the classroom level; and
  - Financial support, particularly for initial investment costs.

This note series is intended to summarize lessons learned and key policy findings on the World Bank's work in education. The views expressed in these notes are those of the authors and do not necessarily reflect the views of the World Bank. For additional copies of Education Notes, please contact the Education Advisory Service by email at eservice@worldbank.org or visit the web site: http://www.worldbank.org/education/

This report reflects contributions from Penelope Bender, Nadine Dutcher, David Klaus, Jane Shore and Charlie Tesar. Photographer: Eric Miller, 2002

RESOURCE 3

Source: http://www.sil.org/sil/global/mdg.htm (Retrieved 30/03/10)

Why Languages Matter

Meeting Millennium Development Goals through local languages

The Millennium Development Goals (MDGs) focus the work of advocates, aid workers, governments and NGOs as they partner with local communities. Language-based development plays a significant role in giving communities tools for meeting these goals.

Many of the poorest people speak mother tongues that are neither national nor international languages. Poverty, lack of access to primary education, inequality and disease are daily challenges for them.

- Can the development of minority languages become key to helping people create their own way of successfully meeting the challenges in their lives?
- Can writing systems for mother-tongue languages and multilingual education become tools for people to build a better present and a better future?
- Are the long-term results worth the investment of money and time?

The answer to each of these questions is yes!

Around the world, communities are discovering that by using their own language in new arenas of their lives, they are developing solutions to the challenges stated in the MDGs. Through language-based development SIL International assists in strengthening ethnolinguistic communities worldwide.

Language-based development is a series of ongoing planned actions that a language community takes to ensure that their language continues to serve their changing social, cultural, political, economic and spiritual needs and goals.

Quechua alphabet and word charts help students grasp literacy concepts even when used in Spanish-taught classrooms.

SIL International believes that local language-based development is essential to achieve the Millennium Development Goals.

The purpose of SIL is to build capacity for sustainable language-based development through research, translation, training and materials development for ethnolinguistic minority communities. SIL recognizes that multilingualism promotes unity in diversity and international understanding.

As a nongovernmental organization, SIL has special consultative status with the United Nations Educational, Scientific and Cultural Organization (UNESCO) and with the Economic and Social Council (ECOSOC) of the United Nations. SIL is a founding member of Maaya, the World Network for Linguistic Diversity.

7500 W. Camp Wisdom Road
Dallas, Texas 75236-5629 USA
www.sil.org
www.sil.org/sil/global/
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Why Languages Matter

Meeting Millennium Development Goals through local languages

Harnessing the power of language as a tool for development

Millennium Development Goals

Eight goals were adopted by 189 United Nations member states to be achieved by 2015. As expressed below, SIL views local language-based development as essential in reaching these goals.

1 Eradicate Extreme Poverty and Hunger

Income improvement and hunger relief within ethnolinguistic communities is achieved when life-changing information is communicated in a language that people understand well. Higher literacy rates often result in higher per capita incomes.

2 Achieve Universal Primary Education

Primary education programs that begin in the mother tongue help students gain literacy and numeracy skills more quickly. When taught in their local language, students readily transfer literacy skills to official languages of education, acquiring essential tools for life-long learning. The results are the growth of self esteem and a community that is better equipped to become literate in languages of wider communication.

Learning to read occurs most easily in the language the learner speaks best.

3 Promote Gender Equality and Empower Women

Nearly two-thirds of the world's 875 million illiterate people are women. In ethnolinguistic communities, boys are often encouraged to interact with others in languages of wider communication. Girls, however, are typically expected to stay close to home where the local language is often the only language used. Research shows that girls and women who are educated in languages familiar to them stay in school longer and perform better academically than those who do not get mother-tongue instruction.

4 Reduce Child Mortality

The mortality rate for children under five years of age is reduced when information about disease prevention and treatment is presented in local languages. Conversely, poor understanding can lead to dangerous or even fatal misinformation. Ethnolinguistic communities can combat diarrhea, malaria and other common illnesses when they have the resources and capability to obtain essential health knowledge.

5 Improve Maternal Health

A mother is better able to care for herself and her family when she is literate in her mother tongue and has access to health information in a language she understands well. Language-based development facilitates the introduction of new concepts and the accurate translation of new terminology.

6 Combat HIV/AIDS, Malaria and Other Diseases

People in ethnolinguistic communities are vulnerable to HIV/AIDS, malaria and other diseases due in part to the lack of essential information in the mother tongue. Reading materials in local languages that discuss hygiene, nutrition, and the prevention and treatment of diseases have proven to be effective in improving general health and life expectancy. The availability of culturally-relevant information dispels misconceptions surrounding HIV/AIDS.

7 Ensure Environmental Sustainability

Environmental preservation principles are communicated through literature in language-based development programs. As local populations learn appropriate technology while drawing on traditional knowledge of flora and fauna, they meet economic needs while protecting the environment.

During a mother-tongue-based development project, the people of Ambai village in Papua, Indonesia, learned that clearing the mangrove areas had resulted in soil erosion.

8 Develop a Global Partnership for Development

Global partnerships among ethnolinguistic minority communities and national and international societies require communication and mutual understanding. Mother-tongue revitalization ensures that a language continues to serve the changing goals of its speakers. It provides a bridge for the community to meet its broader multilingual goals by acquiring a language of wider communication. Language-based development facilitates the broader exchange of traditional knowledge and makes the benefits of global information and communications technologies available.

6 Lessons about monitoring and evaluation

6.1 Project Development

Some particular lessons about monitoring and evaluation are linked to more general lessons about project development.

- Good community development projects can take decades to become fully effective, so that the three year time frame which was inherent in the KOHA programme often provided a rather limited operational perspective;
- Long term retention of field staff of local NGOs needs to be supported, and care taken to ensure that their employment conditions and salaries are linked to this outcome. High staff turnover not only creates problems and delays for supporting and running projects and programmes, but also introduces considerable extra costs through needs for additional training and support of new staff by remaining staff and by the New Zealand NGO;
- Local NGO administrators need to recognise the key role played by experienced field staff working as a team in the success of their projects and programmes;
- Field staff need to support communities and fully integrate monitoring and evaluation with that support.

6.2 Use of monitoring and evaluation data

It is important to use all the monitoring and evaluation data that is collected. Extensive collection for its own sake is not useful for either monitoring or evaluation, wastes resources, and can even undermine the central parts of the monitoring and evaluation framework. Consideration needs to given not only to the NZ organisation's and partner organisation's requirements, but also to the need to provide useful feedback to the participants both as an end in itself and to improve data quality. Communities provide better information if they find the collected data useful.

Data quality can be improved through better control of the non-response which will often occur if communities do not appreciate the uses to which the data is being put. At the extreme, communities may refuse to provide information. They may also provide data of poor quality if they do not see the benefits to themselves.

This means that the feedback of information collected for monitoring and evaluation to participants is crucial in order to gain, extend and maintain community trust. What needs to be clear to the communities is that the information is being collected primarily for their benefit. Useful feedback (e.g. of average participate income, and asset and asset growth information) can be a valuable contribution to the community, and can help make it much clearer how and why the information is being collected and used by the partner NGO for the community's benefit. Without such feedback, collecting personal information risks being perceived as personal intrusion and tends to provide low quality monitoring and evaluation.

Resource 4 provides Bamberger, Rugh and Mabry's (2006) overview of the steps necessary in helping clients to use the evaluation, and Resource 5 expands this into a set of guidelines.

Lessons

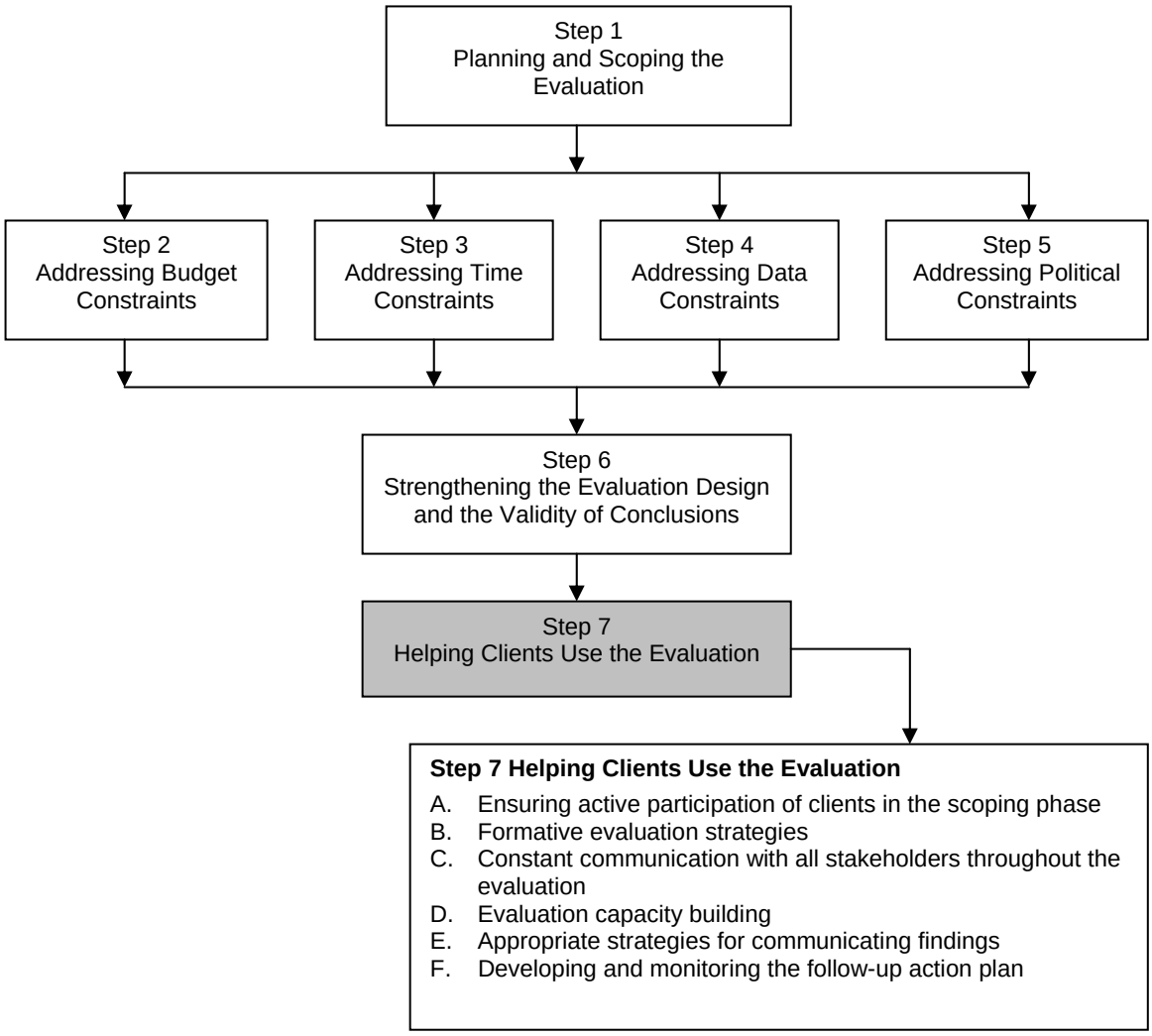
8 Organisations should use sound participatory methodologies for the collection and use of monitoring and evaluation data, to ensure relevance and the necessary community involvement.

RESOURCE 4

Helping Clients Use the Evaluation

Source: Bamberger, M., Rugh, J., and Mabry, L. (2006). *RealWorld Evaluation: Working under budget, time, data, and political constraints*, page 157. Thousand Oaks: Sage.

N.B. These guidelines refer to *evaluation* only, but would also apply to data collected for *monitoring*. In this framework, *clients* refers to those funding an evaluation, but the same principles would apply to other users of the evaluation, including community members.



RESOURCE 5

Guidelines for Helping Clients Use the Evaluation

Source: Bamberger, M., Rugh, J., and Mabry, L. (2006). *RealWorld Evaluation: Working under budget, time, data, and political constraints*, page 163. Thousand Oaks: Sage.

N.B. These guidelines refer to *evaluation* only, but would also apply to data collected for *monitoring*. In this framework, *clients* refers to those funding an evaluation, but the same principles would apply to other users of the evaluation, including community members.

1. **Scoping the evaluation**
   a. Understand the client's information needs.
   b. Understand the dynamics and timetable of the decision-making process.
   c. Define the program theory on which the program is based in close collaboration with key stakeholders.
   d. Identify budget, time, and data constraints and prioritise their importance.
   e. Understand the political context.
2. **Formative evaluation strategies**
   Try to incorporate *process evaluation* and other methods that provide periodic feedback to clients on ways to improve project implementation.
3. **Constant communication with clients throughout the evaluation**
   a. Keep clients informed about the progress of the evaluation and the preliminary findings and hypotheses.
   b. Ensure there are "no surprises" for clients in the main evaluation reports.
4. **Evaluation capacity building**
   a. Actively involve clients and users in the scoping phase.
   b. Ensure that the program theory model is developed in a participatory way.
   c. Ensure that users understand the trade-offs in the choice between RealWorld Evaluation designs.
   d. Invite users to participate in the evaluation training programs for practitioners.
   e. Encourage users to participate in the periodic progress briefings on the evaluation.
5. **Communicating the findings of the evaluation**
   a. Understand what the users want to know.
   b. Understand how different users like to receive information.
   c. Ensure that presentations are pitched at the right technical level.
   d. Consider separate customized presentations targeted for different audiences.
   e. Ensure that reports are available in the user's language.
6. **Developing a follow-up action plan**
   a. Ensure that there is user buy-in to the evaluation so that users are prepared to consider using relevant findings and recommendations.
   b. Identify options, but where possible let users decide the actions to be taken.
   c. The role of the evaluator in the preparation of the action plan should be as a low-key technical resource and facilitator. Sometimes it's better not to attend all action planning meetings to allow more freedom to clients and other users.
   d. A key role for the evaluator is to ensure that an action plan is prepared. As far as possible, the content should be left to the users to define and follow up.

7 Lessons about organisational travel

Organisations should have clear procedures about the emergency contact information required for and by staff and others travelling on behalf of the organisation:

7.1 Emergency contacts in the field

If there is an emergency at home, e.g. accident or bereavement, family members should know how to contact people who are travelling; either directly through their organisations, or through partner organisations.

If there is an emergency in the field, e.g. accident or natural disaster which may affect people who are travelling, their organisation and family should have contacts for checking with them.

These processes should include:

- Registering for all overseas trips on the New Zealand Ministry of Foreign Affairs website, www.safetravel.govt.nz.
- Having accessible and readily available lists of after hours contacts for key people in the New Zealand organisation, and in overseas partner organisations.
- Having detailed itineraries of the trip available, with contact information included.

7.2 Emergency contacts at home

If there is an emergency in the field, members on the trip should know how to contact:

- The New Zealand organisation (including after hours);
- Next of kin in NZ (or elsewhere) for other members on the trip;
- Insurance companies of other members on the trip.

Lesson

9 Organisations should have clear procedures for the recording of contact information when staff or others are travelling overseas.

APPENDIX

Terms of reference

Annual KOHA Organisational Reviews of Selected New Zealand Non- Government Organisations 2008/2009
(Contract and TOR extended for 2009/10)

Background

The KOHA Scheme, formerly known as the Voluntary Agency Support Scheme or VASS, was established in 1974 in recognition of the role of non-governmental organisations (NGOs) as partners in the delivery of international development assistance managed by the New Zealand Agency for International Development (NZAID).

The primary purpose of the KOHA Scheme is to improve the lives of people by addressing poverty and injustice internationally through overseas community development projects and programmes supported by New Zealand NGOs. This is achieved through:

- Providing funding for New Zealand NGOs involved in supporting partners providing high quality overseas community development projects and programmes;
- Supporting the continuation and development of a strong and effective New Zealand NGO sector involved in development through international partnerships; and
- Facilitating partnerships and linkages between the New Zealand community and New Zealand international development NGOs[21].

The annual KOHA organisational reviews normally assess four or five New Zealand NGOs that access KOHA funding each year to ensure that their development approach and practice is consistent with the requirements of the KOHA Scheme. Only two organisations have been chosen for review and field visits during the 2008/09 financial year and these are identified in the attachment to these terms of reference.

Reviews cover the period since each NGO's last organisational review, or, where there has been no previous review, for the last five years, or from the time when the NGO began accessing KOHA or VASS funds if it has been using funds for less than five years. For the first time this year, the organisational reviews will also consider the NGOs' engagement with the Humanitarian Action Fund (HAF) in addition to the KOHA scheme. The review period for the 2008/09 reviews begins on 1 November 2007 and ends on 30 June 2008. The terms of reference for the reviews should be read in conjunction with the KOHA Handbook, particularly the section entitled Review, Accountability and Learning and the section on the Principles and Criteria of the scheme, and also the HAF Handbook, which was designed as a complement to the KOHA Handbook.

Objectives of the 2008/09 KOHA organisational reviews

Objective 1 To ensure that the development approach applied by NGOs being reviewed is consistent with the purpose, community development focus and criteria of the KOHA Scheme.

Objective 2 To ensure that the NGOs being reviewed have appropriate capacity and systems and processes to support their KOHA development work. This includes appropriate organisational capacity, financial systems, and project identification, appraisal, management, monitoring and evaluation arrangements, as set out in the KOHA Handbook.

Objective 3 For organisations that have undergone a previous review, to assess what progress has been made in implementing the recommendations of that review.

[21] KOHA Handbook, p 12

Objective 4 To identify any areas where NGOs being reviewed need to make changes in order to comply with requirements of the KOHA Scheme and to make suggestions as appropriate for other practice improvements.

Objective 5 For organisations that have used the Humanitarian Action Fund (HAF), to ensure that the approach, systems and capacity of the NGOs being reviewed are appropriate to the guidelines and criteria set out in the HAF Handbook.

Objective 6 To identify general lessons from the organisational reviews that will be of interest to the New Zealand NGO sector involved in development work as a whole, and lessons on the operation of the KOHA Scheme for NZAID and the Programme Management Committee (PMC) of the KOHA Scheme.

Responsibilities
The review team will:

Stage 1: Preparation
- Meet with NZAID and the PMC for a briefing and decide on an action plan to carry out the two organisational reviews.
- Prepare the self-evaluation questionnaire and additional questions for the organisational profile and send them to the organisations being reviewed.
- Ask organisations to complete these and return them to the reviewers.
- Discuss and confirm dates for domestic reviews with PMC liaison person and each of the organisations being reviewed.
- Collect and read documents covering the review period from NZAID's and the KOHA and HAF Administrators' files on each organisation being reviewed.

Stage 2: Domestic visits
- Undertake a domestic review of each organisation being reviewed to consider whether it has appropriate capacity and systems to support its KOHA development work and HAF work where applicable.
- Provide oral feedback on preliminary findings to each organisation being reviewed.
- Discuss and confirm dates and arrangements for field visits.
- Ensure that each organisation being reviewed provides copies of in-depth reports on the projects to be visited before the field visits.

Stage 3: Field visits
- As required, identify and contract an in-country interpreter in consultation with the local NGO.
- Undertake field visits to the projects nominated by the PMC (including the communities they serve) to look at how the New Zealand NGO's work plays out in the field with particular reference to its development approach, the nature of its partnerships and the application of the KOHA and HAF criteria in the partnerships and projects.
- Provide oral feedback on preliminary findings to each partner visited, ensuring that they understand that it is the New Zealand organisation and not the project visited that is the subject of the review.

Stage 4: Report writing and discussion of reports
- As appropriate, consider the suitability of the organisation being reviewed to move to block grant status or to move to programme funding.
- Complete separate draft reports on each of the two organisations which identify compliance and practice improvement issues as appropriate.
- Submit drafts to the PMC for consideration and meet the PMC to discuss them.
- Incorporate PMC comments as appropriate and submit resulting drafts to respective organisations, seeking their feedback on factual errors in the report.
- Meet with each organisation being reviewed to discuss the draft report prepared on it. These meetings will usually be chaired by the Independent Chair of the PMC.
- Finalise reports and submit them to the PMC.

Stage 5: Lessons learned

- Complete a report on lessons learned for the New Zealand NGO development sector on generic lessons learned from the reviews.
- Complete a report on lessons learned for NZAID and the PMC on the operation of the KOHA Scheme and the HAF, with suggestions for improvements as appropriate.
- Submit draft lessons learned reports to the PMC for consideration and meet with the PMC to discuss the reports.
- Finalise reports and submit to the PMC.
- Brief PMC members for discussion of the lessons learned for the NGOs at the annual NZAID/NGO forum.

Other

- Provide periodic reports to the PMC on the progress of the review.
- Provide a financial progress report to each PMC meeting.

Outputs

- Expenditure reports for each PMC meeting.
- A presentation to the PMC in verbal or written form outlining the reviewers' activities and conclusions and commenting on any issues regarding the review process.
- A report incorporating the findings for each organisation (one report per organisation)
- A report to NZAID and the PMC on lessons for the effective operation of the KOHA Scheme and the HAF.
- A report to the wider NGO community on the generic lessons from the reviews.

Composition of organisational review team

The core team for the organisational reviews will consist of:

- two consultants
- a member of the PMC who will join the reviews as a full team member and be responsible for acting as the point of liaison between the review team and the PMC. When necessary and appropriate, there may be an additional team member who may be a second PMC member, an NZAID staff member or other person as agreed by the PMC. The specific roles and responsibilities of PMC or other New Zealand NGO representatives on the review team in any particular year will be covered by a separate short contract between NZAID and each of the representatives concerned.

NGOs being reviewed are encouraged to send their own representative with the review team for the visits to their projects in the field. Costs of accompanying the review team may be met by applying for Assessment Monitoring & Evaluation (AM&E) funding under KOHA - or for block grant NGOs, by allocating AM&E funding within the usual block grant requirements.

Attachment

New Zealand NGOs to be reviewed and projects to be visited in the 2009/10 KOHA reviews

1 Organisations and projects selected for review

a. Organisation Mahitahi
Country: Domestic Review only
Project(s): No project visit

b. Organisation: Save the Children
Country: Nepal
Project(s): Social Movement for Education
Quality Education in Udayapur

c. Organisation: Oxfam
Country: Vanuatu and Papua New Guinea
Projects(s): VRDTCA Capacity Building for Vanuatu Rural Training Centres
PNG Highlands Programme[22]

d. Organisation: CBM
Country: Thailand
Project(s): Community Based Rehabilitation for the visually impaired

2 In-depth reports:

The KOHA PMC will request each organisation under review to provide an in-depth report on those projects that are to be visited prior to the start of the domestic review.

[22] This was replaced by the Rural Cooperatives in Timor-Leste project.