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Workshop on
Logical Framework Analysis
for
Overseas International Assistance Projects

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A Thesis Equivalent
in
The Department
of
Education

Presented in Partial Fulfillment of the Requirements
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Abstract

Workshop on Logical Framework Analysis for Overseas International Assistance Projects

Patricia Trites

This thesis equivalent project involved the development, implementation, and evaluation of a workshop and training manual on the subject of Logical Framework Analysis (LFA) as part of an international development project in Russia. The goal of this project was to introduce and make LFA comprehensible to overseas implementing agencies.

Research and theory from social sciences and adult education were used in the project's development and a scientific qualitative approach was employed. Procedures included a review of relevant literature and Internet sites, personal communication with subject matter experts in the fields of adult education, international development, and logical framework analysis; pre and post Workshop communication with Workshop participants and reflection on personal experience gained from working for seven years on a project in Russia. I chose a qualitative approach because I believed it would be most helpful in planning the workshop as well as in providing a richer understanding of learners' attitudes toward the theory and practice of logical framework analysis.

Based on the completion of an LFA by each of the working groups, feedback received and personal observations made during the workshop, I believe that the goals of this learning activity were accomplished.

Acknowledgements

I wish to dedicate this manuscript to Lena who told me at a very early age,
“You can do anything if you put your mind to it.”

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Chapter 1: Introduction

Organizations that are involved in international development are faced with an array of challenges. Among these challenges are shrinking international development budgets, the difficulty of implementing projects in countries where the necessary physical and human infrastructures are lacking or weak, and the need to assure that the projects have some lasting impact. With increased emphasis on efficiency, effectiveness and accountability there is an ever-increasing emphasis on the need for projects and programs to be planned and implemented carefully. The logical framework analysis (LFA), or some derivation of it, is widely used worldwide in all phases of project management and is used also as a participatory approach to development. It is therefore important for both development agencies and their overseas executing agencies to be familiar with this management tool. (See Appendix A for a description of Logical Framework Analysis.)

1.1 Statement of the Thesis Equivalent Problem

Many overseas partner organizations, charged with implementing internationally funded projects, are unfamiliar with the Western management approaches employed by donors. Logical framework analysis (LFA) is one such management approach that is used widely, with modifications, by international donor organizations. Being unfamiliar with LFA has a negative impact on recipient implementers' ability to manage projects in accordance to the standards set by their international donors. Lack of familiarity with LFA has another important drawback for would-be recipients of foreign assistance. It prevents them from developing proposals using the process and language with which donors are most familiar, thereby decreasing the likelihood of having their proposals funded.

The goal of this thesis equivalent project was to introduce and make LFA comprehensible to overseas implementing agencies, specifically to members of the Russian Public Health Association (RPHA). It proposed to accomplish this through the development of a workshop and an instruction manual on the subject based on participant feedback and personal observations made during the workshop.

1.2 Methodology

In developing this thesis equivalent, a scientific qualitative approach has been employed and research and theory from social sciences and adult education were used in its development. Procedures included a review of relevant literature and Internet sites, personal communication with subject matter experts in the fields of adult education, international development, and logical framework analysis; and pre and post Workshop communication with Workshop participants. Reflection on personal experience gained from working for seven years on a project in Russia also helped to inform the project. I chose a qualitative approach because I believed it would be most helpful in planning the workshop as well as providing a richer understanding of learners' attitudes toward the theory and practice of logical framework analysis.

1.3 Context of the Problem

As Western nations move into a post-industrial phase there is a need for management tools that respond to a shift from market based economies to ones that are information based. Unlike market-based economies where the emphasis is on predictability and

repetitive activities, an information-based economy is reliant on change and flexibility (Frame, J.D., 1994). In this new order, project management has become increasingly important and logical framework analysis has emerged as an important management tool that is widely used by international development agencies.

Like many other Western nations, Canada has seen its international development budget decrease in the past decade while the need for development assistance continues to grow. Agencies that rely on federal financing in order to carry out their international assistance activities are engaged in fierce competition for a piece of this ever-shrinking pie. At the same time that these organizations are being asked to do more with less, there is an increased emphasis on their project management being efficient, effective and accountable. This requirement is, in turn, passed along to local implementing agencies of these projects that are funded with Canadian development assistance.

Logical framework analysis has been widely used for overseas development activities since it was first formally adopted as a planning tool by USAID in the early 1970s. The genesis of LFA can be traced back to private sector management theory, particularly the “management by objectives” approach that became popular in the 1960s. Currently the basic LFA concepts have been adopted and adapted as a planning and management tool by a number of agencies that provides overseas development assistance (ODA). These organizations include the Canadian International Development Agency (CIDA), British DFID, Germany’s GTZ and the Australian AusAID, along with a number of UN agencies. Since the LFA approach is being used so widely by donor organizations, it is to

the benefit of overseas recipient agencies, whose projects have been developed using this methodology, that they too be familiar with the basic principles of LFA. This is essential in order that they understand the expectations of donors, share a common management tool with them, and report on a project's evolution using mutually understood terminology.

1.4 Analysis of the Problem

Logical framework analysis is widely used as a management tool and a participatory approach to development. It is at once both elegantly simple and complex, and as an aid to conceptualizing a project or programs it has widespread and flexible application. As previously stated, the problem being addressed in this thesis equivalent project was to introduce and make LFA comprehensible to overseas implementing agencies. In dealing with an overseas partner, the Russian Public Health Association, it became apparent that little was known about this management technique in Russia and there was interest in becoming familiar with logical framework analysis. A workshop, and subsequent instructional manual, seemed the most appropriate way of introducing the subject since all indications were that information on this topic did not exist in Russian.

1.4.1 Needs Assessment

Before planning a workshop or instructional materials on the matter it was first necessary to conduct a needs assessment. A needs assessment has been described as "...the systematic effort that we make to gather opinions and ideas from a variety of sources on

performance problems or new systems and technologies” (A. Rossett, 1992, p. 62).

Interviews and consultations via email with both Canadian and Russian implementers of CIDA funded development projects were used to confirm the utility of being familiar with LFA. These interviews and consultations indicated the belief that LFA could be useful in both project management and in becoming more competitive in developing proposals. Questionnaires were distributed to proposed Russian participants prior to the workshop to determine both their level of familiarity with the subject and what they expected to obtain from attending the workshop. Attendance at the workshop was voluntary and attendees were free to leave at any time. I requested that respondents to the questionnaire be assured of their anonymity.

Along with interviews, email consultations and pre-workshop questionnaires, I drew on my seven years experience of managing a project in Russia and working closely with Russian professionals during that time. Personal observation had indicated that most of the Russians involved in the project, although highly educated, had little experience in either proposal writing standards that were expected by Western donors or any practical experience of management techniques employed in the West. Their inexperience in proposal writing can likely be attributed to the fact that until the break-up of the former Soviet Union they were not in a position of being dependant on foreign donors.

Communication with the West was very limited, including access to Western professional literature. By the very nature of Soviet approaches to policy implementation, Western ideas of stakeholder involvement were simply not appropriate. The State had decided

what projects were to be implemented and how this would be accomplished, with little or no input from citizens.

When topics for workshops had been suggested to the Russian Public Health Association (RPHA), the topic of LFA had been among those chosen. The choice was confirmed as being of interest to RPHA membership when those who were invited to attend the workshop expressed their desire to do so. All twelve persons who were invited to attend the LFA workshop were sent a brief questionnaire asking them what, if anything, they knew about LFA and what they hoped to gain from attending the workshop. Only five of the twelve responded to the pre-workshop questionnaire. None of those who responded had heard of LFA but all expressed an interest in learning more on the subject. Their stated reasons for attending included “gaining new ways of systematizing previous knowledge”, “learning new approaches to project management”, “making contact with potential donor organizations”, “gaining new knowledge of both the LFA process and the literature concerning it”.

If considered from Maslow’s hierarchy of needs, most of the respondents seemed to have self-actualization as their main motivation although undoubtedly there were more pragmatic reasons including the possibility of becoming involved in an internationally funded project. This is an important consideration in a country where local professionals sometimes go for months without receiving a salary.

Together with Russian project personnel it was decided that a workshop would be the best means of introducing the subject. Malcolm Knowles' (1970) theory of andragogy served to inform both the choice of a workshop as the means of instruction and the structure of the workshop. Knowles has stated that learners want to apply what they have learned as quickly as possible and that people attach more meaning to learning they gain from experience. The two-day workshop introduced participants to LFA principles and had them engage in developing a logical framework matrix for a project they would like to develop.

The workshop modality is an excellent choice for introducing LFA because the subject is particularly suited to group activity; in fact the successful construction of an LFA matrix is dependant on a collaborative effort. Although perhaps accustomed to a more didactic approach to learning, Russians who attended various conferences, seminars and workshops, in which I had previously participated, had adapted easily to workshops. In planning the Workshop it was decided that although sophisticated presentation programs such as Powerpoint are widely used in the West, overheads would be used instead during the workshop in Russia. This choice was based on two main considerations. Powerpoint is not widely used among Russian NGOs but overheads are familiar to them and are widely used. I was concerned that if Powerpoint was used technical difficulties might necessitate that I switch to overheads, thus disrupting the flow of the workshop.

Communication difficulties and different ideas pertaining to participatory development were two important considerations in taking into account how LFA could best be introduced to overseas project implementing partners.

1.4.2 Potential Communication Difficulties

One of the primary considerations in developing a Russian workshop and instruction manual on the subject of LFA was that the materials would have to be translated into Russian along with any questionnaires, etc. that might be used in their development. Personal experience with workshops on the subject matter in my mother language, English, had made me aware of how difficult it can be to convey seemingly simple concepts. It would be especially important to develop the training materials in a clear and precise manner, and ensure that they were translated back into English after their translation into Russian. Not all concepts can be translated literally from one language to another and translating back into English was an important means of ensuring that the translation was accurate.

Language, with all its nuances, is a key component to most aspects of communication. The role of a Russian interpreter/translator would be a critical factor in developing both the LFA workshop and instruction manual. Upon arriving in Russia I discovered that the translator who was scheduled to assist with the LFA workshop, and with whom I had worked previously, was unavailable because of a family crisis. Fortunately a very capable replacement was found who not only spoke excellent English but also had a background in management and administration. After several preliminary meetings with

him that included a review of workshop materials, the translator and I felt that we would work effectively as a team.

1.4.3 Different Ideas Regarding Participatory Development

Most Western aid either explicitly or implicitly favors projects that employ key stakeholders in all stages of project design and implementation. The LFA workshop was being delivered as part of a social development project whose purpose was to contribute to the health of the Russian people through the formation of a public health association. The overarching goal of the project, however, was to contribute to the democratization process within Russia. As mentioned previously, LFA is both a management tool and a participatory approach to development. Indeed, the success of constructing a logical framework analysis requires that key stakeholders be given an opportunity to provide input to the process and product of LFA. It was anticipated that the participatory approach might be a challenge for participants given the traditional, highly centralized, top-down, bio-medically oriented approach to health in the former Soviet Union. (Farmer, R.E., Goodman, R.A., Baldwin, R.J. 1993). The same top-down approach predominates in many non-Western countries that are recipients of Western aid, therefore the Russian experience might be informative in planning future workshops.

1.5 Profile of the Target Audience

Members of the Russian Public Health Association were the target audience for the workshop and training materials. The RPHA is a voluntary, non-governmental Russian organization whose purpose is the improvement of the health of the Russian people

through the promotion of public health principles. Another important characteristic of the organization is that it forms a link between policy makers and the public, allowing the latter to have a greater influence on decisions made by the former. Membership in the RPHA is open to anyone having an interest in public health issues and includes educators, health care workers, government representatives (acting in their capacity as private citizens) and members of the media.

The President of the RPHA identified potential attendees for the LFA workshop based on their being members of the Association and being involved in public health projects in a managerial capacity. I suggested that attendees be drawn from a pool of RPHA members who had attended previous RPHA-hosted workshops on either qualitative research and/or project evaluation and that, as far as possible, there should be gender balance.

Eventually twelve persons attended the workshop and of these five were women. The gender balance was in keeping with previous workshop and seminars in which I had participated in Russia. All participants had university degrees in fields related to health or education; all had experience in managing either nationally or internationally funded projects. The male participants tended to work in senior capacities in projects that were regional or national, the women tended to work in projects that were more community based. Although two or three participants were fairly fluent in English, knowledge of the language was generally quite limited and working with an interpreter/translator was necessary. Participants were not asked to divulge their ages but personal observation suggested that their ages ranged from the mid thirties to middle age.

The purpose of developing a workshop and subsequent instruction manual on LFA was to introduce the management technique to overseas implementers of projects funded through foreign aid. The participants at the Russian workshop were felt to be representative in age, education, professional experience and gender, of the larger audience that would eventually be targeted.

1.6 Goals of the Instructional Design

The needs assessment for this initiative included consultation with LFA subject matter experts, Canadian and Russian implementers of Canadian government-funded development projects, and the intended beneficiaries. My personal experience of working with NGO groups in Russia was also included. Based on this assessment it was decided that a two-day workshop in Russia would be the methodology by which Logical Framework Analysis would be introduced to a small group of Russian project managers.

The two main goals of the workshop were to:

- introduce and familiarize participants to Logical Framework Analysis and its terminology,
- ensure that participants could, before the conclusion of the workshop, work in small groups to develop a logical framework for a project that they collectively agreed upon.

Chapter 2: Literature Review

The process of developing a workshop and subsequently an instructional manual on Logical Framework Analysis for overseas implementers of internationally funded projects presented a number of rather unique challenges. The workshop would be delivered through an interpreter and background materials on LFA were unavailable in Russian, thus precluding the opportunity for participants to familiarize themselves with the topic prior to the workshop. In addition, communication, time and financial constraints limited the quantity and quality of feedback that could be obtained from workshop participants in the pre and post workshop phases.

The workshop would have to address both the project's stated and tacit goals. Although the specific aim of the workshop was to introduce and familiarize participants to Logical Framework Analysis, the workshop was part of a larger project whose aim was to improve the health of the Russian people through the promotion of public health practises within the country. The project had been funded by the Canadian International Development Agency within its overarching goal of promoting democratization within Russia; the project contributed to this goal through promoting community involvement in public health issues.

In conducting this literature review I was guided by the particular nature of the workshop as well as the more general concerns of developing instructional materials for adult

learners. The Dick and Carey systems approach model helped provide a framework for conducting the literature review for this project. Their approach sees instruction as "... a systematic process in which every component (i.e., teacher, students, materials, and learning environment) is crucial to successful learning" (Dick and Carey, 1990, p.2). Accordingly, I have organized the review under the broad headings of Adult Educators: Their Roles, Attributes and Skills, Understanding Adult Learners, Facilitating Adult Learning, and Planning and Implementing Adult Learning Opportunities. Chapter Three discusses how the information drawn from the Literature Review was used in designing and implementing the project.

2.1 Adult Educators: Their Roles, Attributes and Skills

For many decades in North America and Western Europe thinking about adult education has been moving toward a learner-centred, collaborative approach. In the mid 1920s Eduard Lindeman defined his ideal of adult education as being "*a cooperative venture in non-authoritarian, informal learning, the chief purpose of which is to discover the meaning of experience; a quest of the mind which digs down to the roots of the preconceptions which formulate our conduct; a technique of education for adults that makes education coterminous with life and hence elevates living itself to the level of the adventurous experiment... The teacher moves from acting as an authority figure to become ... the guide, the pointer-out, who also participates in learning in proportion to the vitality and relevance of his facts and experiences*" (Brookfield, 1987, p.4). Along with being technically proficient in the subject area, Galbraith (1990) describes caring and respect as being major attributes of adult educators and states that interpersonal skills

are a subtle but vital part of the learning experience. Knox (1986) and Apps (1980) have similar ideas on what characteristics constitute good adult educators. Both stress the importance of interpersonal skills, as well as a genuine interest in the learners and the ability to make the subject interesting. Along with encouraging learners to become active participants in determining their own learning needs and objectives. Knowles (1984) and Brookfield (1986) emphasize the responsibility educators have in providing physical and psychological climates that are conducive to learning. The emphasis on adult education being more of a learning relationship between equals/ partners is also reflected in much of the vocabulary of current literature. We now frequently speak of *adult learners* rather than *students* and instead of *teachers* we may use the terms *facilitators* or *adult educators* that imply a more student-centred mode of interaction (Merriam and Brockett, 1997. p16).

Gary Conti (Galbraith, 1991) has stated that although the learner-centred approach is most common in literature, a teacher-centred approach is still the most common in practise. This apparent dichotomy between what we say and what we do prompted me to begin my literature review by attempting to know more about my own philosophical orientation and approach to adult education. I found both Lorraine Zinn's Philosophy of Adult Education Inventory (PAEI) developed in 1983 (Galbraith 1991, Chapter Four), and Principles of Adult Learning Scale (PALS) to be very useful tools in this undertaking. Upon completion of the PAEI questionnaire I discovered that my score indicated a Progressive, Humanist Orientation.

A progressive orientation is described as having developed out of the ideals of John Dewey and stresses an experiential problem solving approach to learning. It emphasizes the experience of learners in determining both the problem area and the solution and the role of the educator as being that of an organizer who guides the learning process. A humanist orientation considers learning from the perspective of human potential for growth. It sees the role of the educator as being one who facilitates self-actualization and promotes but does not direct learning. This approach sees the learner as being motivated and self-directed and assuming the responsibility for learning. Maslow and Knowles are two adult educators who are associated with this approach.

Gary Conti describes teaching style as being distinct qualities displayed by teachers that are consistent from one situation to another regardless of context (Galbraith, 1991, chap. 4). The Principles of Adult Learning Scale (PALS) indicated that my teaching style was learner centred rather than teacher centred. A “teacher centred” approach is related to a Skinnerian orientation and assumes that learners are mostly passive and become active by reacting to stimuli in their environment. Learning is identified by changes in behaviour and the outcomes of learning are seen as acquired competencies. In contrast the “learner centred” approach, associated with Maslow, Rogers, Knowles, and others, sees people as being naturally good with an unlimited potential for learning – in which personal experience plays an important part. According to this perspective, reality is relative to the meanings people give their surroundings and motivation results from people’s attempts to achieve and maintain order in their lives.

Some of the implications for the learning environment inherent in the “learner centred” approach are:

- emphasis on the individual learner
- subject matter based on individual’s needs
- learners are trusted to take responsibility for their own learning
- teacher is always available to help
- learning activities stress problem solving
- self evaluation is emphasized.

I believe that by engaging in the PALS and PAEI exercises I gained a deeper understanding of my own philosophy and approach to adult education. While I was not surprised that my PAEI scores indicated a mainly progressive philosophical orientation. I was surprised that there was little difference between my next highest scores in which a humanist orientation was separated from a behaviourist orientation by only a few points. Upon reflection I realized that my earlier education in nursing, perhaps like the health field in general, was likely influenced more than I had realized by behaviourist philosophy. According to Merriam and Caffarella (1999) behaviourism, although encompassing several philosophies, is characterized by three basic assumptions. These assumptions are:

- learning is characterized by changes in behaviour and observable behaviour rather than internal thought processes is the focus,
- the environment, not the individual learner, determines what one learns,
- “the principles of contiguity (how close in time two events must be for a bond to be formed) and reinforcement (any means of increasing the likelihood that an

event will be repeated) are central to explaining the learning process” (Grippins and Peters, 1999).

The realization that behaviourism played a significant part in my philosophical orientation emphasized the importance for me of not taking our belief systems for granted. Our backgrounds contribute more than we realize to our ways of interacting with the world. As educators this is particularly important if aspects of our backgrounds are intruding more into our relationship with learners than we realize.

The literature review concerning adult educators proved helpful in planning the LFA workshop for a number of reasons. It reminded me that although my philosophical approach to teaching was mainly a progressive humanist one, a tendency to a behaviourist approach was a close second. As I would be working with adults who were experts in their own right and I wanted to emphasize my role as a facilitator, I needed to concentrate primarily on the former orientation. This orientation acknowledges the self-direction of adult learners, their unlimited capacity to learn, and the role that past experience plays in their lives. Certain behaviourist principles, such as those of contiguity and reinforcement, as outlined by Merriam and Caffarella (1999) also informed the structure of the workshop. In order to consolidate the learning experience, I ensured that lecture portions of the workshop were followed by opportunities to put into practice what had just been learned. In this way, learners constructed an LFA matrix by the end of the workshop – thus demonstrating their understanding of the process and their ability to use the technique.

2.1.1 Adult Education and Social Change

In the publication *Confronting Controversies in Challenging Times: A Call for Action*, Paul Isley asks whether the starting point of adult and continuing education should be changing the individual or changing society (Galbraith, M.W. and Sisco, B.R, 1992). He contends that pure individualistic education does not exist and that all learning takes place in, or is restricted by, the larger social arena. Likewise he contends that there is no such thing as purely social or collective education and that individual learning and social learning are inextricably linked. He then proceeds to assert his position that “adult educators should openly accept the role as agent for change, creator of the future, designer of social missions” (Galbraith & Sisco, p.26).

Isley believes that at the heart of adult education may be an obligation to give voice to disenfranchised groups of people. He makes the interesting observation that much of development assistance aims at educating the wrong class of people – the poor and disenfranchised. Instead he suggests that we should be targeting the rich and the powerful, the people who are in positions of power and decision making who need to know what impact their decisions may have. Isley is not suggesting an either-or situation but an approach that acknowledges the fact that social change is multi-dimensional and must be approached as such.

Isley’s thinking assisted me in planning the LFA workshop. It confirmed my decision to concentrate on involving participants who were involved in managing health and social

development projects at either national, regional, and community levels. Because the success of LFA depends on a participatory approach, it was hoped that once participants at the workshop became proficient in the use of LFA they would then use it to involve the intended recipients of their projects or programs. A centralized approach to planning had been the norm for many years in Russia. It was first necessary to convince planners that there was value in involving intended recipients before involving recipients themselves.

Although Isley's ideas are inherent in much of development philosophy, it is heartening to see them articulated in a publication that explores future directions for the field of adult education. Isley sees the main implication for practice as being that educators must be guided by a broader vision of their work and the role of education in social change.

Transformation theory, as described by Jack Mezirow (1991) involves reflective assessment of premises upon which we base our assumptions, thus making the interpretation of an experience from a new perspective possible. In his book *Transformative Dimensions of Adult Learning*, Mezirow also sees a role for adult education and social action. He describes social action as meaning different things to different people – from transformation of individual relationships to changes in social structure. Although significant social change is a multi-faceted process that is beyond the scope of any individual, nonetheless Mezirow believes that adult educators can help in the first step of political change - “emancipatory education that leads to personal transformation...” (p. 210). The LFA workshop, with its emphasis on a more participatory approach to project planning, implementation, and evaluation was a small

but important step in fostering the project's ultimate goal of fostering democratization within Russia. The role of adult educators, as seen by Mezirow, includes fostering critical reflection by learners of their assumptions, ensuring that settings for learning are communities of rational discourse, and assisting learners, to the extent possible, to take appropriate action based on their transformative learning.

In the writings of Mezirow we hear echoes of the Brazilian educator Paulo Freire's concept of *conscientization*. This concept is described as a process by which learners "achieve a deepening level of both the socio-cultural reality which shapes their lives and of their capacity to transform that reality through their action upon it" (Freire, 1992, p. 27). Freire believes that, "The starting point for organizing the program content of education or political action must be the present, existential, concrete situation, reflecting the aspirations of the people. ...It is not our role to speak to the people about our own view of the world, nor to attempt to impose that view on them, but rather to dialogue with the people about their view and ours" (Freire, p. 85). Freire is credited with being one of the people whose work contributed to the development of a radical philosophical framework in Western adult education during the late 1960s and early 1970s. In an apolitical context, Freire's theory shares with Mezirow's Conscientization Theory the idea that adult learning is the process of becoming aware of the assumptions, beliefs and values that shape our thinking.

The LFA workshop drew on the thinking of both Mezirow and Freire in encouraging participants to reflect on their own experiences in project management. While some

participants did not initially see the benefit of involving non-experts in project planning, others shared their experiences of projects that had benefited from using the intended recipients to inform all aspects of the project cycle. At the end of this discussion even those who had been at first hesitant to involve non-experts agreed that it might be useful to at least consider the benefits of this approach.

2.2 Understanding Adult Learners

In discussing adult learners it is undoubtedly important to remember that they are not a homogeneous group, and this was certainly true of participants at the LFA workshop. As Huey B. Long notes, there is no such thing as “the” adult learner – there is great diversity physiologically, psychologically, and socially (Long, 1990). Physiologic variables include general health, vision, hearing, and energy levels, while psychosocial variables include cognitive abilities, personality, life experience, role expectations and the environment. Through the various studies on motives for adult learning that have been carried out one general theme seems to have emerged - that adult learners have a problem solving orientation (Sheffield, S.B., 1962; Houle, C.O., 1961; Aslanian, C.B and Brickwell, H.M., 1980; and Boshier R., 1971). The problem solving orientation was evident in a study conducted by Aslanian and Brickwell in 1980. Their research found that 83 percent of adult learners in their study were learning to cope with some sort of transition in their lives and this had motivated them in their learning pursuits.

Boshier’s Congruency model (1973) explains adults’ participation in learning activities as an interaction between personal and social factors. Both of these factors appeared to

motivate workshop participants, and the desire to learn more about a new management technique featured highly in the reasons given for wishing to attend the workshop. As well, participants were keenly interested in using the workshop to discuss how they could develop proposals that would be of interest to foreign donors an understandable interest given the poor economic situation in Russia. Boshier draws on Maslow's Hierarchy of Needs to suggest that participation and persistence in adult education are determined by congruence between their educational environments and how people feel about themselves. Maslow (1970) had suggested a theory of human motivation based on a hierarchy of needs. These needs ranged from a basic level of physiologic needs to the highest level that he called self-actualization. Maslow considered that the motivation to learn is intrinsic in human nature and that self-actualization is the goal of learning.

In the early 1960s C.O. Houle espoused three kinds of motivation in adult learning – activity oriented where participation has little bearing on the content of the learning exercise, goal oriented in which learners participate to meet specific objectives, and learning oriented where knowledge is sought for its own sake. Houle felt that one of the motivations is usually predominant, although two or even three orientations might be present in the individual learner. Up until this time little attention had been paid to the motivation for learning and Houle's work was to encourage further investigation in this area. In planning the LFA workshop I felt that participants would be mostly goal and learning motivated, rather than activity motivated. This appeared to indeed be the case, and a problem centred orientation, as discussed by Knowles and others. was very evident in those who participated in the LFA workshop.

Knowles (1984) bases his well-known theory of learning, andragogy, on four assumptions concerning adult learners. Adult learners are considered as self directed, reservoirs of experience, their readiness to learn is based on developmental tasks of their social roles, and they are problem centred rather than subject centred in learning. Andragogy places individual learners at the heart of the learning process and the theory was to have a huge impact on the field of adult education (Merriam, S., 1987).

Bandura's social learning theory (1970) contends that people learn from observing others and has its roots in behaviourism. However, Bandura broke with a strictly behaviourist orientation and focused more on the cognitive processes involved in observation. Bandura's theory sees people and their environments as being reciprocal determinants of each other and, as such, has particular relevance to adult learning and its role in social change.

2.3 Facilitating Adult Learning

At the core of planning an adult learning opportunity is the issue of motivation in learners. This was an important consideration as I worked with Russian colleagues in planning a workshop in Russia on logical framework analysis. Would participants be motivated to learn this management technique, would they see its potential value, and if not, was there a way to successfully encourage motivation? Raymond Wlodowski (1990) tells us that the word "motivation" is used to describe processes that can energize

behaviour and give direction or purpose to behaviour. The question remains, how can educators encourage this elusive quality?

In 1985 Wlodowski developed a Time Continuum Model of Motivation that incorporates six major factors that he believes influence motivation. The six factors are divided along the “beginning”, “during” and “ending” phases of the motivational continuum.

The beginning phase is when the learner enters the learning process and the associated motivational factors are *attitudes* and *needs*.

- Attitude – a combination of information, emotion, concepts, etc. that results in a predisposition in the way we respond to stimuli in our environment.
- Need – a force that leads us in the direction of a goal.

During the learning phase, learners become involved in the main part of the learning process and *stimulation* and *affect* are the major motivational factors at this time.

- Stimulation – any change in the perception of, or experience of, our environment that makes us active.
- Affect – the emotional response of the individual learner or group while learning.

At the end of the learning process, *competence* and *reinforcement* become particularly important.

- Competence – based on the theory that people naturally strive for effective interactions with their world.

- Reinforcement – any event that maintains or increases the probability of the response it follows.

Wlodowski sees the primary value of the Time Continuum Model as being an organizational aid for each phase of the cycle, where it carries a significant motivational influence and presents an opportunity for the educator to recognize associated motivational needs. He offers some practical motivational strategies that include asking learners what they already know about the topic and what their related learning expectations are. He suggests using tutorials, games and creative problems as ways of encouraging learner participation as well as encouraging teamwork in problem solving. He regards giving feedback as being an essential part of the motivational process. He stresses the importance of treating learners with the positive expectation that they will learn; and suggests that adults feel better when they see the subject matter as being important and something which they value. I found that the Time Continuum Theory provided a useful framework for considering what motivational requirements might be considered at each stage in planning and implementing the LFA workshop. I employed several of his suggested strategies during planning and implementing the workshop. These included asking participants what they knew about the topic in advance of the workshop and what their learning expectations were. In addition, the construction of an LFA matrix as the workshop progressed proved to be a very effective way of encouraging teamwork and creative problem solving.

Knowles' (1984), Andragogical Model emphasizes the learner as a mutual partner in the learning process. He speaks of the need to create a physical and psychological climate that is conducive to learning, involve learners in defining their own learning needs and objectives, assist them to carry out their learning plans and involve them in evaluating their learning. More recent work by Boud and Miller (1996) also sees one of the central tasks of animators/facilitators as being to create a microclimate, culture, climate and space within which learning will be facilitated.

Mezirow (1990) states that the essence of adult education is "...helping adults construe experience in a way that enables them to see the reasons for their problems and the options open to them, so that they may assume responsibility for decision making" (p. 361). Encouraging critical self-reflection is central to Mezirow's Transformation Theory of learning, a process that is also emphasized by Brookfield (1986). Brookfield believes that the total measure of adult learning is more than the ability to perform technical operations successfully – the total measure should include the kind of knowledge that comes from reflection on personal experiences.

Many of the models of adult education seem to agree on a link between adult learners being motivated to participate in a learning activity and the learners' present and past life experiences and environment. Based on their experience in the United States, Merriam and Caffarella (1999) have summarized the adult learner's profile as being "white, middle class, employed, younger, and better educated than the non-participant" (p. 71). They have further identified employment-related reasons as being the main incentive for

participating in continuing education. Undoubtedly knowing the profile of adult learners is useful to educators in designing and implementing learning opportunities, especially if adult education is to have a role in social development.

Mackeracher (1996) cautions that motivation arises from within the individual and cannot be instigated directly by the educator. It is also important to keep in mind that, regardless of internal motives, a person's place in society and social situation may be the ultimate determining factor in whether or not a person engages in continuing or adult education. The present and past life experiences of those who participated in the LFA workshop certainly were factors in the learning experience. Their prior experience had included a didactic approach to instruction and a centralized approach to project planning as compared to the informal, participatory approach that was being promoted in the workshop. Their current experience of living in a country that was now a recipient of foreign development assistance contrasted sharply with their fairly recent reality of living in a country that was a world power. In planning and implementing the workshop it was important to keep these factors in mind in order to be sensitive to how they might impact on the learning experience.

2.4 Planning and Implementing Adult Learning Opportunities

Learning has been called one of the most basic of human activities. It has been described as "the process through which we become the human beings we are, the process by which we internalize the external world and through which we construct our experiences of that

world.” (Jarvis, P., Holford, J., Griffin, C., 1998, p.vii) The challenge for adult educators is how to facilitate and encourage the learning process.

Knox, in his 1986 publication, *Helping Adults Learn* (p.xi) contends that although most instructors are expert in their subject matter, they are sometimes less proficient in helping adults learn. He regards the needs assessment as being essential in identifying gaps between learners’ current and desired levels of proficiencies as perceived by the learners themselves and others. He also sees the process as being helpful for instructors in identifying their own assumptions concerning participants, and becoming more responsive to the adult learner. In Dick and Carey’s third edition of *The Systematic Design of Instruction* (1990) they offer a nine-step process for designing, producing, evaluating, and revising instruction. Although it is presented as a series of steps, the authors acknowledge that it should and will be modified and adapted to meet the particular needs of individual instructional designers in particular circumstances.

Rosemary Caffarella, in *Planning Programs for Adult Learners* (2002), suggests a non-linear interactive model of program planning that sees the process as a set of interacting and dynamic elements, allowing program planners to address a number of the components simultaneously. However, she acknowledges that in working with learners from autocratic and more centralized countries a more linear interpretation of the model may be more appropriate (p. 22). I regarded this as being an important consideration in planning the LFA workshop and had personally noted in previous workshops that Russian participants seemed more comfortable with a more structured, linear approach.

Caffarella also believes that a highly structured needs assessment is not the only way to identify ideas for education programs, in her opinion the personal observations and hunches of educators also have their place. A. Rossett (1996) likewise believes that highly structured needs assessment may not be necessary or useful in some situations, particularly if an employer or the state is mandating the educational program. While planning the LFA workshop in Russia it was not possible to do a highly structured needs assessment. I relied on the advice and experience of Dr. Andrei Demin, my Russian partner and President of the Russian Public Health Association, my own experience in working with Russian colleagues during the project's implementation, and a pre-workshop questionnaire that was completed by workshop participants.

Transfer of learning has frequently been thought of in behavioural terms, what is to be transferred can be clearly specified in terms of observable changes in knowledge, skills and attitudes. While acknowledging the truth of this, Yelon and Ford (1999) caution that learning is often more complex and multi-faceted. They believe that six major factors influence the transfer: program participants, program design, program content, changes required to apply learning, organizational context, and community and societal forces. These were all important considerations in developing the LFA workshop. I felt that the last two factors were especially important and that adoption of the LFA technique in Russia would probably not happen immediately. Instead, it would happen over time and would be aided by the fact that familiarity with the technique would be an important factor in obtaining foreign funding. The important role played by day to day experience

in adult learning is the basis of the “situated cognition approach” to its understanding. Merriam and Brockett (1997) explain that “... cognition (or knowing) is not merely something that goes on inside of the individual, but rather is tied to the surroundings and life experience of the learner” (p. 156).

The importance of a comfortable physical and emotional environment in setting the stage for an effective learning experience has already been discussed and an equally important consideration is choosing an appropriate method for delivering the instruction. Merriam and Caffarella (1999) state that most learning in formal settings remains primarily instructor designed and directed, and suggest that a merging of learner directed and instructor directed learning is needed (p. 37). I attempted to have this merger occur in the LFA workshop.

A number of different methods and techniques have been developed and employed when teaching adults, including lecture, learning contracts, demonstration and simulation, experiential learning and problem based learning. The decision on which to use and when to use it depends on such variables as the experience and personal philosophy of the instructor, the culture in which the learning is taking place, and whether or not the setting is formal or informal. O’Donnell and Caffarella (1990, p. 134) discuss learning contracts, in which learners establish the parameters for learning, as being one way to adapt educational needs to meet individual learner needs. Lindquist (1975) and Knowles (1980) suggest that contract learning helps to develop the habit of lifelong learning. The technique is not suitable for all situations and O’Donnell and Caffarella caution that

locating appropriate resources is key to whether or not learners term their self directed learning a success. Limitations are cited as being time pressures and students discomfort with the unknown, for both of these reasons it was decided that a learning contract approach would not be suitable for the Russian LFA workshop.

Shirley Farrah describes lecturing as informative speaking ((1990. p.162) and regards it as an appropriate tool of adult educators when the information to be transmitted is not readily available, when it is necessary to present the material within a short time frame. and when it is necessary to challenge the beliefs, attitudes and behaviours of learners. Augmenting the lecture with other methods ensures that the learners become more actively involved and facilitates learning. In an article in the “Adult Education Quarterly”, Oddi affirmed his opinion that lecture is an appropriate technique when the learning task is the acquisition of knowledge (1983). Among the potential disadvantages of lecture is the danger of learners being exposed to only one person’s viewpoint as well there being inadequate learner participation/involvement.

Demonstration and simulation, both based on experiential/action learning, are useful methods in designing educational opportunities for adult learners. Simulation is a technique that “enables learners to obtain skills, competencies, knowledge or behaviours by becoming involved in situations that are similar to real life” (Gilley, 1990, p. 272). Demonstration, on the other hand, is the “accurate portrayal of a procedure, technique, or operation” (Laird, 1986, p. 262). Victoria Marsick (1990) cautions that action learning is not appropriate for problems that are highly technical, where the answer is known by

experts, where there is little ambiguity, or where the decision maker has already decided on a course of action – discounting other alternatives. Action learning is a good strategy when an adult educator is looking for a way to help learners reflect on their experience and learn from it in conditions of ambiguity. The method is compatible with many of the premises upon which adult education is built; it is focused on immediate problems, is highly participatory, and is based on learner experience.

The writings of Oddi (1983), Gilley (1990), and Marsick (1990) confirmed for me that my choice of a combined lecture and action learning (specifically simulation) approach to the LFA workshop was an appropriate one that would be most advantageous to workshop participants. The workshop approach was to intersperse the lecture portion with frequent periods wherein participants practised what they had just learned. This also relieved the strain of listening to a lecture that had to be translated and had the added benefit that by the end of the workshop participants had completely constructed an LFA matrix.

The final portion of my literature review addressed the practicalities of conducting a workshop and developing effective print-based instructional materials. *Writing for Change*, an interactive guide to effective writing (Barker and Manji, 2000) proved to be a very useful tool since it specifically addresses the subject of developing training workshops and related materials. The authors advise that all training needs to be planned with the following considerations in mind:

- Who will you train?
- What are the trainee's needs?

- How long will the workshop last?
- Where will you train?
- What training style will you adopt?
- What training materials will you need?

Barker and Manji suggest that, if possible, no more than 15 people should be trained at any one time. If providing instruction for a large number of participants is necessary the instructor should plan to include times in the learning experience when participants have the opportunity to work in small groups. Barbara A. Walker (1994) believes that “small groups are laboratories in which people help each other explore the issues created by differences with others” (p. 218). Mabey and Iles (1994) also consider group work as being the foundation for action learning in which participants learn from their own experience and that of others. All of these suggestions and ideas were incorporated into the planning of the LFA workshop and the end result was that the twelve participants rated the workshop highly in content, usefulness, and logistics. Certainly, working in small groups and sharing their knowledge, ideas, and experiences seemed to be an experience that was appreciated by all.

When developing print-based instructional materials, Barker and Manji suggest that you focus on what it is you want your document to do and write about the document’s purpose rather than its subject. This was an invaluable piece of advice in my opinion since my purpose was to introduce the LFA process to learners and to have it made comprehensible for them. It was important to remember this in developing both the workshop’s overheads and the subsequent instruction manual. It would have been very

easy to forget my primary purpose if I became too involved in the intricacies of the subject, about which books have been written and university courses taught. When the writer has decided on the document's purpose, Barker and Manji suggest that he or she can then proceed with developing the materials.

Wieringa, Moore and Barnes (1993, p.6) stress the importance of correctness and usability in writing instructional materials. The materials must not contain errors of fact and must be presented in such a way that their meaning is clear to the user. Barker and Manji, as well as Wieringa, Moore and Barnes, stress the importance of writing clearly and concisely. This advice is echoed by Brusaw, Alred, and Oliu, (1987) who state that "Careful writers remove every word, phrase, clause or sentence they can without sacrificing clarity" (p. 122).

It is not enough that materials are accurate and well written, they must visually appeal to the reader. White space can enhance the readability of text, whereas a crowded page may appear too complex to read (Booher, 1992). Some other generally accepted principles concerning format include:

- Use type that is readable under the worst conditions of expected use.
- Use mixed case to increase the readability of text.
- Use consistency of font, placement of page numbers, headings, etc. throughout the document.
- For general use, flush left justification with ragged right justification.

The review of literature concerning the development of print based materials was extremely important since printed materials would be one of the main vehicles by which information concerning LFA would be transmitted.

Overall, the Dick and Carey (1990) systems approach to instruction helped provide a framework for conducting the literature review for this project. Their systematic approach, which encompasses every component of the learning experience including teacher, students, materials, and learning environment, provided an excellent framework for planning, implementing and evaluating the LFA learning experience.

Chapter 3: Development of the Workshop and Instructional Materials

As discussed in Section 1.4, Analysis of the Problem, the rationale for developing a workshop on Logical Framework Analysis was two-fold. First, familiarity with LFA would enable participants to develop proposals and manage projects using techniques and terminology that were familiar to foreign donors. This shared understanding would thereby increase the likelihood of funding by foreign donors for any proposals developed by workshop participants. Secondly, the process of developing a proposal using LFA is a participatory one that would address the overarching goal of the CIDA-funded project of which the workshop was a part, namely promoting democratization in Russia.

3.1 Pre-workshop activities

Prior to the Workshop participants were contacted and asked to respond to two questions. The questions were translated into Russian and the responses were translated back into

English. Participants were asked whether they were aware of Logical Framework Analysis as a management technique, they were also asked how they felt the workshop might be of benefit to them. Of the twelve participants only five responded.

Before the event took place, participants received a workshop outline that had been translated into Russian. (See Appendix B: Outline of Logical Framework Analysis Workshop.) Rosemary Caffarella (2002) states that learning objectives set the tone for learning outcomes (p.156). Along with a broad statement of purpose, (Knowles (1980) advises that it is also necessary to have a clear statement of the results that are proposed for a planned learning activity (p. 122). The outline for the workshop was developed keeping these caveats in mind.

3.2 Development of materials and implementation of Workshop

The importance of white space and short concise sentences were important considerations in developing overheads. It is important to remember that overheads convey main ideas, provide learners with a framework for the instructional activity, and help to keep the instructor focused. Overheads that contain too much text are simply distracting. My workshop overheads were translated into Russian and given to participants as handouts at the beginning of the workshop. These Russian translations were viewed from the overhead projector while I used identically numbered overheads in English with speaking notes to ensure that the lecture and the Russian overheads were synchronized. (See Appendix C: Overheads for Logical Framework Analysis Workshop.)

The two-day workshop took place in Moscow on May 21 and 22, 2001. Several days prior to the workshop I met with the Russian translator with whom I would be working to discuss the workshop content. This was especially important because it was our first time working together, the regular translator being unavailable because of a family crisis. Fortunately the translator had an undergraduate degree in Management and Administration and although he was not familiar with LFA he grasped the concept quickly. He had also worked at the Russian Embassy in Ottawa for a number of years and had an excellent appreciation of Western management ideas as compared to the traditional Soviet style approach. He pointed out that the people attending the Workshop would have been schooled in the latter approach and that it would undoubtedly be a factor in their response to the LFA. Since there is no Russian equivalent for the word “objective” he suggested that the word “purpose” would be used instead for the workshop.

Twelve people, seven of who were men and five were women, participated in the workshop. Barker and Manji (2000) suggest that “a good mix of people usually makes for a good training session”(p. 18) but caution against too much diversity. Barker and Manji, along with Walker (1994), agree that small groups are most often more effective than larger ones in learning situations. Participants at the LFA Workshop had advanced degrees in either health or education and all had experience in managing projects that were supported either by the Russian government or international donor organizations. As indicated in section 1.5, Profile of the Target Audience, most male participants held

senior positions in regional or national projects while their female counterparts tended to work in more community-based projects.

Both Knowles (1984) and Farrah (1990) have stressed the importance of a pleasant physical setting, including good lighting, a comfortable room temperature, and adequate audio-visual equipment, in facilitating the learning experience. Knowles also emphasizes the importance of creating a relaxed atmosphere in which participants feel free to participate. Ten minutes was allotted at the beginning of the Workshop for participants to introduce themselves. It took a little longer than the allotted time, as I knew it would for this to be accomplished but far less than if no time limit had been suggested. In Russia introductions can be a lengthy affair and I had requested that people try to keep the introductions brief, giving their names and what they hoped to obtain from the workshop. I deliberately did not ask people to give their positions or institutional affiliations since the participants ranged from representatives of government departments to community based workers. I thought that the diversity of positions might intimidate some participants but this did not appear to be the case. People generally found a way to insert this information into their introductions.

The venue for the workshop was a large meeting room, formerly a ballroom, in the heritage building in which the Russian Public Health Association (RPHA) was housed. The high-ceilinged room with its tall windows had a charming atmosphere but presented some challenges. The tables were fixed in an oval pattern with an open space in the centre and no possibility for arranging them into smaller groupings, there was little space

on the walls for posting charts, and the room did not have a microphone or the capacity for simultaneous translation.

Nonetheless an effective physical and emotional educational climate was established. Charts were posted on every surface available (including some windows) and small working groups simply moved chairs to different ends of the table or to corners of the room. A tone of mutual respect and informality was established as illustrated by the way in which participants worked together, freely exchanging ideas and experiences.

It was possible to be heard without a microphone and I made sure that I paused frequently to allow the interpreter/translator adequate time to do his job. Having to stop frequently to allow the translator to catch up is difficult for everyone concerned – the presenter, the translator, and the audience. Realizing this difficulty, the workshop, especially the lecture/presentation portion, was organized in fairly concise time frames. As well, frequent breaks were incorporated into the format and participants were encouraged to ask questions on any points that were unclear during the lecture portion of the workshop.

3.3 Workshop format

The workshop format was a combination of lecture/presentation and action learning in the form of simulation. Several authors believe that learning can be facilitated by lecture while maintaining the basic principles of facilitation – acknowledging learners' life experiences, fostering feelings of self worth, critical reflection, and learner participation (S. Farrah 1990, p.161), and (M. Knowles 1980, p 240). The choice of techniques was

influenced by several factors. Farrah (1990, p. 162) has stated that lecturing is appropriate when the purpose is to:

- present information that is not widely available,
- present the information in a short time period,
- provide a framework for learning activities,
- identify, explain, and clarify difficult concepts, problems, or ideas,
- demonstrate relationships between previously learned and new information
- challenge the attitudes, beliefs, and behaviours of learners,
- stimulate the audience to further enquiry.

These factors were all applicable to the workshop. Resource materials on LFA were not widely available in Russia and none of the workshop participants were familiar with the subject. Because of time and financial constraints it was necessary to present the materials within the relatively short time period of two days. It was understood that whereas some universities devote entire courses to LFA, a two-day workshop would introduce the concepts and provide a basic understanding of the subject. Undoubtedly there would be plenty of further information on the subject that learners might wish to pursue if resources to do so became available.

The lecture format was interspersed with periods of simulation whereby workshop participants had an opportunity to put what they had just learned into practice in the development of a Logframe, the matrix around which a Logical Framework Analysis is constructed. Many of the participants at the LFA Workshop had previously attended a

workshop introducing them to qualitative research. At that time participants had expressed an interest in the topic of youth and addictive substances. Youth and addictive substances was again chosen at the LFA workshop as the theme around which people wished to work, thus providing a link between the LFA Workshop and the previous one on qualitative research. Thus an excellent opportunity was provided to demonstrate relationships between previously learned and new information.

When planning the Workshop, I concentrated on how I would best relay information concerning LFA, encourage participation, and motivate participants to see the benefit of adding this technique to their existing management skills. I did not anticipate that some participants might find in the LFA process a challenge to long held attitudes, beliefs, and behaviours. A discussion of the findings and lessons learned from the workshop are included in the next section.

3.4 Development of LFA Manual

The development of an instructional manual on LFA was undertaken after the workshop using the suggestions on developing print-based materials outlined in *Section 2.4, Planning and Implementing Adult Learning*. As well, feedback from Workshop participants - both oral and written, my own observations, recommendations of colleagues, and previous writings on the subject of Logical Framework Analysis all helped in the development of the manual. A preliminary draft of the Instruction Manual was sent to English speaking members of the RPHA for feedback. To date the only comments have been that the manual is a useful reference on a subject about which little

information is available in Russian. The President of the RPHA has offered to translate the final version into Russian and distribute it to LFA Workshop participants.

Chapter 4: Discussion of Workshop Results and Lessons Learned

A process evaluation was employed in designing the LFA Workshop and Instruction Manual. Prior to, during, and after the Workshop suggestions and advice regarding the learning needs pertaining to LFA were sought. The President of the RPHA, Workshop participants, subject matter experts, colleagues working in international development, and the interpreter all provided invaluable information and suggestions. I also relied on my own seven years experience of working in Russia to assist in planning the learning experience and anticipate potential problems.

The LFA workshop took place on May 21 and 22, 2001 and emphasized for me the importance of several matters in contributing to a successful adult learning activity. Above all the facilitator/instructor must be flexible and prepared – not just for the expected, but also to the extent possible, for the unexpected. Being prepared for the expected encompasses knowing the subject matter and how it will be presented, the key characteristics of the learners, and preparation for their physical and emotional comfort. Difficulties with bringing training materials through customs, incompatible electrical connections, having overheads as a back-up to ones' Powerpoint presentation should be routine considerations for anyone planning a workshop overseas.

Being prepared for the unexpected presents a special challenge since it frequently involves things over which the facilitator has no control. When I arrived in Russia I found that the interpreter/translator with whom I regularly worked would not be available. Since I did not speak Russian I had to depend on my Russian colleagues to find a replacement, which they did. It was a serendipitous that this interpreter had an undergraduate degree in management and administration that facilitated his understanding of LFA. This familiarity with management techniques was advantageous for the Workshop but something over which I had no influence - indeed the translator was found just days before the Workshop.

Within the context of providing a learning experience in a different country and culture, being prepared includes having an awareness of socio-economic and cultural differences, as well as linguistic nuances. As an example of the latter, I was told that telling an adult Russian that you wished to interview him or her would likely make the person feel very uncomfortable. Apparently being “interviewed” during Soviet times was often an unpleasant experience. Likewise the use of the phrase “key informant” during a discussion of qualitative research in a previous workshop caused the translator to pause and explain that the phrase had very different connotations for those present. When he explained what had caused his hesitation, workshop participants erupted into laughter.

4.1 Personal Observations

One unanticipated incident that occurred early in the Workshop illustrated the importance of understanding the socio-cultural background of learners. I had explained that it is

important to approach the preliminary work of developing a LFA framework as a team effort involving key stakeholders. After a discussion of who key stakeholders might be, a male physician interrupted to say that he did not see the utility of involving non-experts. In his opinion “the experts” knew what was required and could do the necessary planning, he could not see the benefits to involving non-experts. There was a moment of silence and, based on my own experience and the writings of others, I realized that his views were likely shared by many of those present. In his examination of the history of Russian “Zemstovs” or “peasant schools”, Ben Eklof (1986) found that the traditional view of the peasant was as a recalcitrant child, in need of having decisions made on his behalf by a better-informed elite. This is in keeping with the traditional, highly centralized, top-down, bio-medically oriented approach to health and medical education in the former Soviet Union. (Farmer, R.E., Goodman, R.A., Baldin, R.J., 1993. p. 326.)

Relevant to involving stakeholders, I explained that my experience had been that people are more likely to take ownership of projects when they have been involved in determining needs and how these needs ought to be addressed. As an example I chose a project that was familiar to one of the workshop participants. Knowing that several of the female participants had managed community-based projects, I then asked if any of the participants had had similar experiences. Several of the women claimed that involving the young people with whom they worked seemed to increase the likelihood of their projects succeeding. A lively discussion ensued at the end of which everyone seemed at least willing to try a different approach.

As mentioned previously, the male participants generally held more senior positions than the females and the group dynamics were interesting. Initially I sensed that the women seemed quite nervous and hesitant in venturing an opinion while the men seemed very confident. With encouragement the women became enthusiastic participants in the discussion and seemed to have a harmonizing influence within their groups. Carol Gilligan (quoted in Jarvis et al, 1998, p.69) believes that women develop a morality based on care and responsibility, which contrasts with the morality of men, based on rights. She argues that while a rights-based morality seeks abstract laws and universal principles, a morality based on care and responsibility rejects the idea of objective detachment. In situations of conflict, a care and responsibility based morality makes moral choices based on the particular needs and experience of each participant, leading to understanding and consensus.

Although the discussion of whether and why involving stakeholders was important took more time than I had planned, it was an important issue that learners needed to address before the workshop could progress meaningfully. In discussing the matter and sharing ideas and experiences the participants engaged in social learning. “We learn from and alongside other people...” (Jarvis, et al, 1998, p. 37). On another occasion, when I sensed that a digression was non-productive, I encouraged participants to return to the LFA topic. No one resisted being guided back to the main topic and I felt that my intervention had been appropriate. The interpreter later remarked that Russians are a proud people and rather than admit ignorance of a topic they will seek to change the

direction of the discussion. Undoubtedly this is not a quality restricted to Russians but it was, nonetheless, an interesting observation.

During the lecture portions of the Workshop I was mindful that one of the limitations of lecture is that learners are exposed to one person's viewpoint (Farrah, 1990). I was therefore careful to point out the limitations to LFA as a project management tool well as its advantages. Some suggest that the LFA process does not easily identify the more qualitative outputs of a project and the related objectively verifiable indicators. Others feel that it assumes, wrongly, that the complete nature of problems can be readily determined in the project planning stage and that it is incapable of monitoring unintended consequences. Still others are concerned that it is not easy to implement in cultures in which open criticism is inappropriate.

After some apparent initial resistance to the LFA technique, at least by some participants at the Workshop, everyone seemed to become quite involved in learning about the process. As mentioned earlier, frequent breaks were interspersed with the lecture portion of the learning activity and this seemed helpful in keeping participants actively engaged. When the time came to work on actually developing an LFA, participants broke into two groups as dictated by their areas of interest and work experience. One group concentrated on developing an LFA for a project to decrease smoking in teenagers, while the other group's focus was a project to reduce alcohol and illicit drug use among youth. By working in groups, participants were obliged to work collaboratively, an approach that is essential to developing an LFA. Smith and Pourchot (1998, p 72) and Marsick

(2000 p 253) see group collaboration as being central to the adult learning process because learning is largely a social enterprise and much of human labour is a team effort.

Some writers contend that the key to problem-based/action learning is using materials through which learners address problems within a context that is as close to real life as possible (Jarvis, et al, 1998, p. 117). As well, studies by Sheffield (1962), Houle (1961), Aslanian and Brickwell (1980) and Boshier (1971) have listed a problem orientation as being one of the primary motivations of adult learning. By choosing to work on issues in which they were involved in their real lives, Workshop participants chose problems that were meaningful to them – not just theoretical.

As mentioned previously, some of the learners had participated in an earlier workshop on qualitative research and would participate in a workshop on the analysis of qualitative data following the LFA Workshop. In all three workshops, participants chose tobacco, alcohol and illicit drugs as they relate to youth as the themes around which they organized their practical exercises, thus creating links in the knowledge they were acquiring.

At the workshop's conclusion participants were each issued a certificate of attendance, stamped with the official stamp of the Russian Public Health Association and signed by the Association's President. Participants appeared to appreciate this and I was told that Russian professionals expect a formal confirmation of having participated in a learning

activity. Although in no way suggesting a level of competency in the subject matter, it appeared that the certificate conveyed an air of formal legitimacy to the learning exercise.

4.2 Participants' Formal Evaluations of the Workshop

At the end of the Workshop, attendees were thanked for their participation and asked to assist me by completing a Likert scale as an evaluation of the LFA Workshop, as well as writing any suggestions or complaints in a space provided. Participants were advised that responses were to be anonymous; their responses alone were all that was required. It was explained that their feedback could help by making future workshop more responsive to learners' needs, addressing any perceived problems, and informing the development of the LFA instruction manual.

The Likert scale ranged from 1 to 5 (with 1 being the most negative score and 5 being the most positive one) and addressed three aspects of the Workshop, its logistics, its content, and its usefulness to participants as individuals. All twelve participants completed the Likert scale and eight of those respondents wrote additional comments that were translated for me. The content of the Workshop was given a rating of 5 by eleven participants, with one person giving it a rating of 4. Logistics of the Workshop received a rating of 5 by 10 participants and 4 by two persons. Eleven participants gave a rating of 5 to the usefulness of Workshop participation, and one person rated it as 4. The written comments and suggestions concerning the Workshop are found in Appendix D. One of the suggestions was to supply a Participant List with attendees, names, positions, and

contact details. This suggestion was acted upon before people left the workshop since it was also received as a verbal suggestion.

I received the translated results of the Workshop evaluation only after the subsequent workshop on analyzing qualitative data had finished and had also been evaluated. I was amazed to find that many participants had signed their evaluation forms even though it had been explained to them I did not wish to know their names. When I questioned the interpreter/translator about this he advised me that the Russian translated evaluation form had had a space for participants' names.

I then approached the President of the RPHA to ask why this was so, even though I had specifically requested that participants be assured of anonymity. The President replied that participants had been advised that it was unnecessary to sign their forms. The fact that people chose to do so was a common practice in Russia and he believed that persons would respond truthfully whether or not their responses were anonymous. He then pointed out that the evaluations of the Qualitative Data Analysis Workshop were slightly more critical than those of the LFA Workshop and he felt this proved participants were responding with candour. It was obvious that we had different ideas on the importance of anonymity. I reiterated my belief that anonymity made people more open to giving negative criticism but it was obvious that my Russian colleague was willing to give people the option of anonymity but was not about to encourage it.

4.3 Informal Feedback on Workshop by Participants and Others

In evaluating the success of the Workshop I also took into account my observations as participants interacted during the Workshop, their informal comments made during breaks, their ability to successfully complete an LFA matrix by the end of the workshop, and the opinion of the interpreter. After some apparent initial unease at the beginning of the Workshop participants relaxed and participated freely, socialized during breaks but continued to discuss Workshop matters, and asked if I would forward additional information on LFA to them. All of this indicated to me a high level of interest in the learning activity.

An informal process evaluation was part of the appraisal of the LFA workshop. An outline of the workshop was distributed prior to the event and participants were asked to outline what their expectations of the workshop were. Throughout the workshop participants were asked whether they understood materials that had been covered before proceeding to the next section, clarification was then provided as needed. Participants had an opportunity to work on an LFA matrix as each relevant part of the workshop was completed. At the end of the learning activity both working groups had completed an LFA matrix for their simulated projects, thus demonstrating that the process was understood and that they could effectively use the concepts. The more formal portion of the evaluation in which a Likert scale was used has already been discussed.

I also sought the opinion of the interpreter at various points during and after Workshop sessions as to whether he thought participants understood the subject matter and whether

he sensed any issues that he felt needed to be addressed. He felt there was a high level of interest in the subject but, for some participants, involving key stakeholders in planning was a theoretical exercise and it would not soon be put into practice. Nonetheless he felt that there was a keen interest in knowing how things were done in the West, and that participants would likely integrate some of what they had learned at the Workshop into their practices.

4.4 Conclusion

Logical Framework Analysis is a management approach that has been adopted by a wide range of international development donor organizations. Being familiar with this management tool is therefore an important skill for would-be recipients of grants from these donors. It allows the would-be recipients to develop proposals using the language of donor organizations and demonstrates that they will understand the standards by which the effectiveness of their proposals and projects will be judged.

The goal of this project was to introduce and make LFA comprehensible to overseas implementing agencies, specifically to members of the Russian Public Health Association, through the development of a workshop and an instruction manual on the subject. Based on the completion of an LFA matrix by each of the working groups, feedback received and personal observations made during the workshop, I believe that these goals were accomplished.

The literature review made it apparent that in planning a learning exercise for adult learners a number of issues must be considered if the exercise is to be a successful one.

The considerations include:

- the attributes and skills of adult educators, including their philosophical orientation and teaching style;
- an understanding of adult learners and their motivations;
- a sensitivity to the socio-cultural environments in which the learning will take place;
- an awareness of program planning skills including the various methods, techniques and strategies that can be used to enhance the learning experience.

The LFA Workshop was successful in imparting the fundamentals of the LFA process to the intended audience and encouraged workshop participants to think about a different approach to planning and implementing programs. In doing so it also addressed the larger project goal of promoting democratization and here it is important to realize that these new ideas, if accepted, would undoubtedly be adapted to fit the Russian reality.

As the workshop facilitator, in planning and implementing the learning experience I gained a renewed appreciation of the complexities involved in the successful transfer of information. I was reminded as well that teaching at its best is an exchange of information, and of the importance of continually keeping this two-way process in mind.

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Appendix A

Description of Logical Framework Analysis

In the 1960s the Logical Framework Analysis approach originated as part of an U.S. military approach to planning. It was designed to “facilitate comprehensive and detailed planning for tangible and measurable outcomes” (Nancholas, S., *Health Policy and Planning*; 13(2), 1998, p.189). The approach was subsequently adopted and refined by a number of international development agencies and became known by a variety of names including Log Frame in the U.K., objective-oriented planning in Germany (ZOPP), as well as being integrated into results based management (RBM) at Canada’s CIDA. In 1993, following a recommendation contained in the Auditor General’s Report, the Canadian International Development Agency (CIDA) joined a growing number of international development agencies in adopting a results oriented approach to management. The impetus for adopting this approach in Canada was a growing national debt, a reduction in foreign aid, a need for demonstrable program outputs, and a greater public demand for more transparency and accountability (CIDA Working Document, 1st edition, June 1994). CIDA’s initial efforts to integrate a results based management approach into its corporate culture drew upon the Logical Framework Analysis approach.

Logical Framework Analysis is designed to assist comprehensive and specific planning for tangible and measurable outcomes (Nancholas, 1998). It is both a management philosophy and participatory approach that emphasizes results in all stages of project management. These fundamental stages in program management are well known and include planning, implementation, and evaluation.

The LFA process begins with the identification of a problem or need. Next, we consider how these needs can best be met given the constraints of such things as political will, social stability, availability of skilled program/project implementers, and time and resources available. Also inherent in the planning of a project is the need to identify its timeframe, the reach of the project – what it can logically hope to accomplish, and the depth of change it can hope to produce. LFA involves stakeholders in all of the aspects of process described above. The following table is the standardized matrix used for summarizing the Logical Framework Approach.

Narrative Summary	Objectively Verifiable Indicators (OVI)	Means of Verification (MOV)	Critical Assumptions
Goal (1)			
Purpose (1)	Impact (End of project status)		
*Outputs (3-7) (Effects of completed activities)	Short term results		
Inputs/Activity clusters (3-5 per output)	(budget summary)		

The preceding table was adapted from S. Nancholas' article *How to do (or not to do) ... A Logical Framework 1998*.

The LFA matrix is a 16-box table that serves as a means of summarizing the LFA process. In constructing an LFA matrix a small group of project delivery staff works from the general to the specific, basing their deliberations on a thorough needs

assessment. The LFA matrix contains a number of headings, the definitions of which have achieved a certain amount of standardization over the years. The goal relates to the project's vision, the absolute reason for embarking on the project, which will ultimately benefit the well being of a population. The purpose is the basic motive for the project; it contributes, but is not sufficient, to achievement of the project's goal. One goal and one purpose should be stated for each logical framework matrix in order to keep the planning clear and minimize possible confusion. Outputs are the concrete results, the deliverables, which must be produced in order to achieve the purpose. Inputs, or clusters of activities, are the resources to be mobilized in order to produce the outputs.

As shown in the preceding table, the Logical Framework matrix consists of vertical and horizontal hierarchies. The vertical hierarchies are found in columns one and four of the matrix. The first column (vertical hierarchy) relates to the project's Goal, Purpose, Outputs, and Activities. In developing an LFA it is important to consider factors that are external to the project and over which the project has no direct control, yet which may affect the extent to which the project is successful in reaching its objectives. These are known as critical assumptions and they make up the next part of the vertical hierarchy – the fourth column. In the fourth column we examine critical assumptions/conditions for the project's goal, purpose, outputs and the pre-conditions necessary for inputs. The causality linkages between inputs, outputs, purpose and goal are based on these critical assumptions.

Columns two and three (Objectively Verifiable Indicators and Means of Verification) make up the horizontal hierarchy. These enable us to examine the objectively verifiable indicators and their means of verification for Goal, Purpose, Outputs and Activities. Objectively verifiable indicators are a set of criteria indicating the degree of success at each level of the vertical hierarchy. They might be quantitative, qualitative or both. In keeping with the dynamic nature of a project these indicators must be validated periodically. The means of verification (column three) may include such sources of information as government reports and surveys.

The LFA matrix has a number of advantages. It is a very useful planning tool in developing a project; it helps to keep project developers focused on the identified problems and proposed results, and ensures linkages between the vertical and horizontal hierarchies at all stages of project development, implementation and evaluation (Nancholas, 1998). The matrix also succinctly summarizes each of a project's main goals on one page.

The LFA process itself does have limitations and some suggest that its greatest weakness is in addressing the more qualitative outputs of a project and their objectively verifiable indicators. At all times it is important to remember that it is a tool to assist project management – it is not an end in itself. Some additional criticisms of the LFA process include:

- It begins by addressing problems and some feel that this negative focus pervades the rest of the LFA.

- It assumes that the nature of problems can be determined at the outset of planning.
- It is sometimes developed after the project has been designed rather than forming the basis for design.
- It does not readily enable monitoring of unintended results.

Both Sue Nancholas and Herman Rosenberg (*Health Policy and Planning*, 14 (1) 82-84) emphasize that stakeholders must engage in extensive preliminary work before the development of the LFA. Considerable thought must be directed toward, identifying the problem and determining what the most appropriate level of intervention might be. Since the LFA is a bottom-up process it must work towards integrating needs identified at the lowest levels with policies formed at the higher levels.

Appendix B

Logical Framework Analysis Workshop Schedule

Venue: Russian Public Health Association

Dates: May 21 and 22, 2001

Facilitator: Pat Trites, CPHA

Overview

Logical Framework Analysis (LFA) is an analytical, representational and management tool which evolved from private sector management theory. It is based on the core concept of cause and effect. Since the 1970s it has been adopted and adapted in countries such as the U.S, Canada, Australia, and Great Britain as a planning tool by organizations involved in both private sector and overseas development activities. The workshop aims to introduce participants to LFA, how it evolved, its underlying concepts, application, advantages and disadvantages. In order to gain practical experience in using this technique, participants will engage in developing a Logical Framework Analysis Matrix for a project proposal and will complete this activity by the end of the Workshop.

May 21

0930 - 0945 hrs. Introduction of participants

0945 – 1000 hrs. What is Logical Framework Analysis (LFA) and how can it benefit my organization?

1000 – 1100 Analyzing the problem you wish to address.

1100 – 1115 Coffee break

1115 – 1230 Stakeholder /Beneficiary Analysis. Who are the main stakeholders? What are their interests? What are the relationships between stakeholders? (The target group is included among the stakeholders.) How does your analysis impact on project design?

1230 – 1330 Lunch

1330 – 1445 Objectives Analysis

In objectives analysis the problems identified earlier when you carried out the problem analysis are now developed into objectives. Each objective is broken down into sub-objectives and outputs.

1445 – 1500 Break

1500 – 1600 Discussion of activities, inputs, outputs, outcomes, impact and indicators.

May 22

0930 – 1000 Review of key concepts from previous day. Clarify any related questions.

1000 – 1015 Break

1015 – 1230 Development of a Logical Framework Analysis Matrix for a project proposal.

1230 – 1330 Lunch

1330 – 1515 Finalize LFA

1515 – 1530 Evaluate workshop

Appendix C

Overheads from LFA Workshop, Moscow May 21 and 22, 2001

Logical Framework Analysis Workshop

Moscow
May 21 and 22, 2001

1

Logical Framework Analysis (LFA)

- LFA is an approach to project management.
- Its origins can be traced back to private sector management theory.
- It has been adopted and adapted by a large number of international donor organizations: Canada's CI8DA, Germany's GTZ and Australia's AusAID.

2

Logical Framework Analysis

- The core concept underlying the logical framework is cause and effect.

3

Logical Framework Analysis

LFA is useful at every stage of the management cycle. It helps managers and planners in:

- Conceptualization
- Planning
- Implementation
- Monitoring and evaluation

4

Logical Framework Analysis

LFA forces us to:

- Anticipate problems
- Verify results
- Draw lessons from experience
- Use these lessons to adjust our strategies

5

Logical Framework Analysis

Helps to:

- Analyze existing situations during project planning and preparation
- Identify means of achieving goals
- Identify potential risks
- Establish how to monitor and evaluate outputs and outcomes
- Summarize information in a matrix

6

Preliminary work to developing an LFA matrix

Project planning and management should be approached as a team task. It is important to involve colleagues and key stakeholders in providing input to the process and product of LFA.

7

Preliminary work to developing an LFA matrix

- Problem analysis
- Stakeholder Analysis
- Objectives analysis
- Select implementation strategy

8

Problem Analysis

- Identify the basis of the problem you wish to address.
- Address the cause not just the symptoms of the problem.
- Problem analysis helps to show the cause and effect between problems.

9

Stakeholder Analysis

- Identify stakeholders.
- Determine stakeholders' roles, interests, power and capacity to participate.
- Identify cooperation or conflict between stakeholders.
- Determine how the above information should be used in designing the project.
- Identify the target group – those who are directly affected by the problem and who might benefit from any proposed problem solution.

10

Objectives Analysis

- What is the end you wish to achieve and by what means will you achieve it?
- To create objectives, reword the negative statements from the problem analysis to positive statements.
- Statements should be clear.
- Ensure links between statements are logical.
- Simplify if possible

11

Implementation Strategy

- How many problems or objectives should you address?
- What are the best interventions to bring about desired results?
- What are the costs of different interventions and what can you afford to do?
- What are the gender, capacity building, and environmental considerations

12

LFA terminology

Goal: project's vision, the essential reason for doing the project that will ultimately benefit the well being of a population.

Objective: also known as project's purpose. Refers to the development outcome you expect to see at end of project. It contributes to, but is not sufficient for, the achievement of the project's goal.

13

LFA terminology (cont'd.)

Outputs: tangible results that must be produced in order to achieve the objective. (Some users of LFA divide outputs into short-term and long-term, with long-term outputs sometimes being referred to as outcomes.)

14

LFA terminology (cont'd.)

Critical assumptions: important factors, external to the project, over which the project has no direct control.

Objectively Verifiable Indicators (OVI): the information needed to determine progress toward project objective. OVI can be quantitative, qualitative or a combination of the two.

OVI are:

- Tools for measuring change
- Indicators that are measurable
- Directly derived from project's purpose

15

Important Reminder

Logical Framework Analysis (LFA) works from the general to the specific, basing deliberations on a thorough needs assessment.

16

LFA Matrix

- The LFA matrix traditionally consists of four columns and four rows.
- The vertical hierarchy, or Narrative Summary, refers to the project's Goal, Purpose, Outputs and Activities.
- The Horizontal hierarchy of Objectively Verifiable Indicators, Means of Verification, and Critical Assumptions refers to each item in the Narrative Summary.

17

Narrative Summary	Objectively Verifiable Indicators	Means of Verification	Critical Assumptions
Goal (1)			
Purpose (1)	Impact		
Outputs (3-7)	Short Term Results		
Inputs/activities	Budget Results		

18

Advantages of LFA matrix

- LFA is a useful planning tool. It:
- Helps focus those developing the project
- Ensures linkages between vertical and horizontal hierarchies
- Summarizes a fully developed proposal on one page.

19

Limitations of LFA

- Weakness in addressing more qualitative outputs of a project and their objectively verifiable indicators
- Sometimes used in a way that is compulsory, rigid, and over-standardized.

20

Appendix D

Translated comments received from Workshop participants on Evaluation Form

1. *Provide participant list with attendees' names, positions, and contact details.*
2. *Voice amplification is needed. The hall is beautiful but with too good acoustics. If a person speaks to his neighbour in a low voice it becomes more difficult to hear the speaker.*
3. *It would be useful to have a written example of an international program. (I assume that the writer of this comment was requesting a sample of an LFA matrix that had been developed by a foreign donor.) It was not clear how workshop participants were selected; however it was very interesting to work (together).*
4. *To express gratitude to RPHA and CPHA on behalf of peoples of Dagestan.*
5. *It would be useful to have an e-version of Smoking or Health.*
6. *Continue with such workshop working experiences.*
7. *Meet more often.*
8. *Continue training sociological methods to be used for working with groups.*

Appendix E

Instruction Manual on Logical Framework Analysis

Instruction Manual
on
Logical Framework Analysis

Patricia Trites

Developed in partial fulfillment of
the requirements for the degree of
Master of Arts in Educational Technology

Concordia University
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It is beyond the scope of this manual to provide an exhaustive discussion on the subject of Logical Framework Analysis, or LFA as it is more commonly known. Books have been written, university courses given, and websites developed on the topic. The purpose of this instruction manual is to introduce you, the reader, to the basic concepts of LFA, encourage you to learn more on the topic and explore whether it can be a useful tool for you in the development, implementation and evaluation of projects.

In the development of this project I consulted with subject matter experts and colleagues who used the LFA approach, and reviewed some of the literature and Websites that have been developed on the subject. My overall impression was that although LFA is apparently simple and logical, it is indeed quite a complex undertaking. Much of the literature on the subject has been written by organizations that, having adapted the LFA process to their own needs, then write about it using different terminologies. The diverse ways of describing the process can be confusing for the neophyte to the LFA approach.

This manual draws upon the experience of many different writers in different organizations that have developed their own approaches to LFA and provides an overview of the essentials of the process. Hopefully the reader will recognize that, whatever the changes made in adapting LFA to the needs of different organizations, the basic participatory set of tools remains the same.

Part One: Introduction to Logical Framework Analysis (LFA)

The Logical Framework Analysis (LFA) is a participatory set of tools for planning, designing, implementing and evaluating a project or program. A project can be defined as a unique, goal-oriented, one-time activity, with a definite life cycle, involving the coordination of different activities. A program, on the other hand, generally refers to an interrelated group of projects that share a specific goal.

LFA had its beginnings in the 1960s when it was first introduced as part of a U.S. military approach to planning and was adopted by USAID in the early 1970s as a tool for planning overseas development activities. Since that time it has been adopted and adapted by a large number of agencies involved in providing development assistance. It has also become known by a variety of names including Log Frame by British DFID, objective-oriented planning in Germany (ZOPP), and the Logical Framework Approach (LFA) by Australia's AusAID. As well, it has been integrated into results based management (RBM) at Canada's CIDA.

The impetus for adopting this approach in many countries was a reduction in foreign aid, a need for demonstrable program outputs, and a greater public demand for more transparency and accountability. LFA was designed to assist comprehensive and detailed planning for tangible and measurable outcomes and helps to provide a standardized project summary that can be used across the implementing agency.

Part Two: Basic Components of LFA

LFA is a participatory approach to project design and management. It helps project planners and managers take a logical approach in:

- Analyzing an existing problem
- Establishing objectives and how they will be achieved
- Identifying risks
- Determining outputs and outcomes and how these can best be monitored and evaluated
- Presenting a summary of the project in a one-page standardized LFA matrix.

LFA Terminology

In developing a Logical Framework Analysis we work from the general to the specific and follow a logical sequence. Our analysis begins by clarifying the problem. We then identify the following components of the project: goal, objective or purpose, outputs, inputs, critical assumptions, and objectively verifiable indicators.

Goal: the fundamental reason for the project that will benefit the well being of a population by contributing to sectoral or national objectives. The goal is an ideal – not necessarily attainable during the life of a project.

Objective or purpose: what the project aims to achieve and should be attained through the implementation of the project. It contributes to the overall goal. Only one goal and one objective should be stated in developing an LFA.

Intended results or outputs: the specific results are that the project will achieve.

Activities/inputs: specific tasks to be undertake in order to attain the results. A careful consideration of the activities will assist in the preparation of a realistic budget.

Critical assumptions and risks: conditions that could affect the progress or success of a project, but which are beyond the control of those implementing the project.

Objectively verifiable indicators: means of confirming that the goal, objective, and outputs of the project have been realized.

Distinction between LFA and LFA Matrix

LFA is the process of conducting analyses of the problem and stakeholders, identifying the project's goal and objectives, and summarizing an appropriate implementation strategy. The LFA matrix is a unifying tool that sums up the LFA process into a 16-box grid. It summarizes the different LFA elements into a whole and seeks logical coherency among the various parts.

Part Three: Developing a Logical Framework Analysis

As mentioned previously, LFA is a participatory approach and the first step in conducting an LFA is bringing together a small group of project delivery staff to discuss the proposed project. This team will base their deliberations on discussions with the intended beneficiaries of the project, key stakeholders (government officials, project funders, etc.), and a thorough needs assessment. This situation analysis takes into account three areas – stakeholders, problems, and objectives. A situation analysis seeks to know as much as possible about the issue the project seeks to address. It is wise to begin the analysis phase with a consideration of who the main stakeholders in the project will be. Failure to do so may have a very detrimental effect on a project.

Stakeholder Analysis

Stakeholders include those individuals, groups or institutions:

- that the project is designed to benefit,
- that are crucial to its success (e.g. funding agencies, government departments),
- that have an interest in the project's success or failure.

Stakeholder analysis addresses the questions of whom the problem affects most and who benefits most or is negatively affected by the solution. It is important to understand these questions in order to assess the support or opposition that the project faces from various quarters. Stakeholder analysis is a preliminary and crucial step in conducting a logical framework analysis.

Problem Analysis

Developing an LFA begins with understanding the core problem you wish to address.

The “problem tree” is one widely used way of identifying the core problem, its causes and effects. It is best to visualize the problem tree like any other tree with a trunk, roots and branches. The roots are the causes of the problem, the trunk is the core problem, and the branches are the effects of the problem. Creating a problem tree is a group exercise that may be approached in several ways. One is for participants each to take a blank piece of paper, fold it in half horizontally and write the core problem on the crease made by the fold. Effects of the problem are then written in the blank space above, and causes of the problem are written in the blank space below. The group then reaches consensus on the core problem, determines that the perceived causes and effects are correctly assigned and eliminates duplicates.

Another method of developing a problem tree involves having group members write negative statements describing the situation being analyzed on cards or pieces of paper. The cards are then placed so that they are visible by all – on the wall or the floor. Once participants agree that the most important issues have been identified, they look for similarities in the statements and eventually decide on the core problem. The core problem thus identified represents the collective thinking of participants. It is then written on a card and posted so that it is visible to all. It forms the trunk of the problem tree. The next step is to examine the other negative statements that the group has written and sort them into causes and effects. As in the previous method, “effects” are written

above the core problem and become the branches of the problem tree and “causes” are written below as its roots. Continue to arrange the causes and effects of the core problem. At the end of the process check the arrangement to ensure that “causes” logically lead to their related “effects”. Once the core problem, its causes, and effects have been identified you may proceed with developing the objectives analysis.

Objectives Analysis

Just as many branches grow from the trunk of a tree, in many cases there are several effects resulting from the core problem. Each of these effects may become an objective of the project you are developing. In conducting an objectives analysis the group may use a similar approach to that used in the problem analysis, but this time they will develop an “objectives tree”.

The problem tree showed a cause – effect relationship while the objective tree shows a means-end relationship. The objectives tree is adapted from the problem tree by restating the problems as objectives. The objectives tree uses the same structure but with the negative problem statements turned into positive objective statements. As you proceed with developing the tree it may be necessary to reorder the position of objectives as all the problems identified earlier may not need to become objectives. The top of the tree represents the end that is desired while the bottom of the tree represents the means to achieving the desired results. Once the objectives have been identified, you can begin to analyze the strategies that have been suggested as a result of the previous exercises.

Strategic Analysis

While analyzing stakeholders, problems, and objectives, different approaches to addressing these have undoubtedly arisen. It is now time to examine these more critically. Strategy analysis involves selecting the best strategy to achieve the desired results. The strategy analysis is based on the three components of the situation analysis – stakeholders, problems, and objectives. During the strategy analysis the following questions might be asked:

- How many of the problems/and or objectives should the project address?
- What interventions are most likely to bring about sustainable results?
- What interventions are most likely to result in institutional strengthening?
- Which strategy is most likely to involve the participation of both men and women?
- Which strategy is most sensitive to environmental concerns?
- What budget will be required to address the identified problem, and is the budget realistic?

Part Four: Summarizing LFA into an LFA Matrix

At this time it is useful to develop the LFA matrix outline (below), which graphically summarizes the LFA process as a 16-box grid. In order to keep the planning process clear it is advisable to keep one goal and one objective per LFA matrix. It is especially important to remember that the LFA process is as important as the LFA product and that both are tools of management, not ends in themselves. In the early stages of the LFA design, using pieces of paper that can be rearranged easily on a wall or board allows flexibility.

Narrative Summary	Objectively Verifiable Indicators (OVI)	Means of Verification (MOV)	Critical Assumptions
Goal (1)	Indicators	MOV	Critical Assumptions
Objective or Purpose (1)	Indicators of Impact (End of project status)	MOV	Critical Assumptions
*Outputs (3-7) (Effects of completed activities)	Indicators (Short term results)	MOV	Critical Assumptions
Inputs/Activity clusters (3-5 per output)	Budget summary Milestones specified in activity schedules	Management reports on physical and financial progress of project	Critical Assumptions

In constructing an LFA matrix you begin with the vertical hierarchy (also known as the vertical logic), which is represented in columns 1 and 4. In the narrative summary, column 1, the team identifies the Project's goal, objective/purpose, outputs and activities.

The vertical hierarchy of goal, objective, outputs or activities, and inputs, identifies what the project aims to accomplish and identifies the causal relationships between these levels. In Column 4, also part of the vertical hierarchy, the critical assumptions and risks for every level in column 1 are considered. Under critical assumptions we consider those things that are external to the project and beyond its control, yet important to its successful implementation.

Since the LFA works from the general to the specific, each level forms the rationale for the next level down. It is important to test the logic of the vertical hierarchy to ensure the relationships between each level:

- if appropriate inputs are provided, activities can be implemented,
- if activities are implemented, outputs can be produced,
- if outputs are produced, the object, the objective or purpose can be realized,
- if the objective is realized, it should contribute to the project's goal.

Testing the vertical hierarchy also assists project planners in assessing resource and budgetary requirements.

Construction of the horizontal hierarchy takes place in Columns 2 and 3. In these two columns we check the objectively verifiable indicators and means of verification as they relate to every level in column 1. The horizontal hierarchy of the LFA specifies how each level in the project description (goal, objective, outputs, and inputs) will be

measured and the means of verifying each of these measurements, thus aiding in monitoring and evaluating the project.

If there are several objectives to a project, develop an LFA matrix for each objective separately. The LFA matrix for each objective should be kept to a one-page and strive to avoid cluttering it with too much information. A listing of all activities required in producing the project's outputs and indicators for every activity will be part of the LFA process, most organizations will want to see this information summarized, not repeated, in the matrix.

The LFA process and the matrix that summarizes it can be a very useful tool in all stages of project planning, implementation, and evaluation. It is useful to keep in mind that it is a management tool that needs to be reviewed and changed as necessary during the life cycle of the project. It is not unchangeable and it is not an end unto itself.

Part Five: Strengths and Weaknesses of LFA

Logical Framework Analysis is a powerful management tool but it requires skilled teamwork and flexibility in its development and application. The LFA matrix has a number of advantages:

- It is a very useful participatory planning tool in developing a project.
- It helps to keep project developers focused on the identified problems and proposed results.
- It provides logical links between means and ends.
- It requires analysis of whether objectives are measurable.
- The LFA matrix is capable of succinctly summarize a fully developed project proposal document on one page.

Some of the weaknesses that have been attributed to the LFA include:

- Some feel that the LFA approach has difficulty in addressing the more qualitative outputs of a project and their objectively verifiable indicators.
- It begins by addressing problems and some feel that this initial negative focus pervades the rest of the LFA.
- It appears to assume that the total nature of problems can be determined at the outset of planning.
- It is sometimes developed after the project has been designed rather than forming the basis for design.

- It does not readily enable monitoring of unintended results.

Logical Framework Analysis is a management tool that many international development agencies have embraced and adapted to their particular needs and it is widely used in the development community. It is therefore important for those wishing to obtain project support from these agencies to be familiar with the basics of LFA. For those readers who wish to learn more on this subject a wide variety of reference materials are available and a few of these are listed in the bibliography.

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