

**REPORT ON AN EXTERNAL REVIEW
OF THE PROGRAM INITIATIVE ON
ASSESSMENT OF SOCIAL POLICY
REFORMS (ASPR)**

By

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It is not that we should simply seek new and better ways of managing society, the economy, and the world. The point is that we should fundamentally change how we behave.

Vaclav Havel

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LIST OF ACRONYMS

ASPR	Assessment of Social Policy Reforms
BWI	Bretton Woods Institutions
CABIN	??
CPF	IDRC Corporate Program Framework
IFAD	International Fund for Agricultural Development
IDRC	International Development Research Institute
IDS	Institute for Development Studies
LDC	Less Developed Country
NGO	Non-Governmental Organization
PI	Program Initiative
PIT	Program Initiative Team
PITL	Program Initiative Team Leader
RIADEL	??
RRPSA	Regional Research Program on Social Policy Assessment
RRSPR/ESA	Regional Research Program on Social Policy Reform – East and Southern Africa
SPN/WCA	Social Policy Network – West and Central Africa
UN	United Nations
UNICEF	United Nations Fund for Children
WSSD	World Summit for Social Development

EXECUTIVE SUMMARY

This review treats the evaluation criteria and issues suggested in the terms of references as a composite screen through which to look out from the ASPR at the global context within which it claims validity, quality, relevance and reach. The perspective taken is not that of value-free objectivity, but an explicit frame of reference anchored in a holistic people-centred development paradigm as reflected in the CPFII.

Apart from the IDRC corporate documents and the ASPR program documents, the review focused on three case studies of projects selected in consultation with the PIT. It also reviewed available documents on a range of other projects to verify findings in the case studies. A separate report on the SPN/WCAII is attached as Annex 1 in order to document clearly the serious concerns identified in this project.

The following are the main findings of the review of the ASPR:

- 1. Approach:** The ASPR positions itself in the centre of the macro-economic paradigm of the Washington consensus, seeking to fine tune the social policy reforms that derive from this perspective. It takes mainly a sectoral approach to social service delivery and some social programs and supports the kinds of assessments that are integral parts of the management cycles of such operations. This micro focus seriously limits the leverage it has on social policy choices and alternatives, let alone the macro policy mix that would optimize societal values, such as inclusiveness, equity, universal wellbeing and human rights, including social, economic and political rights.
- 2. Program Delivery Mechanisms:** The ASPR's preference for sectoral research limits its capacity to address social policy issues that cut across sectors, particularly the structural factors in societies that perpetuate poverty producing economic policies and public expenditure patterns that reinforce disparities rather than alleviate them. It treats decentralization as an aspect of social sector reform rather than a governance system reform. This lack of a systems approach in both horizontal and vertical dimensions of societal organization and process severely limits the relevance of ASPR sponsored research to the dynamics and problematique of contemporary societies, whether more or less developed. It also limits the potential scope and relevance of the multi-disciplinarity that it promotes and tends to see as the sine qua non of sound, quality research. Along similar lines, the institutional nature of the networks it supports tends to reinforce rather than bridge the divides between researchers, policy makers, program managers, civil society and the general public. The potentials of e-research networks, of interconnectivity and of virtual issue communities are not adequately recognized and explored, except by supporting 'connectivity'.

- 3. Program Implementation:** The general impression of effectiveness and efficiency of program implementation in terms of management of inputs and production of outputs that a superficial review of available documents gives is marred by the findings of the case studies, particularly the SPN/WCAII. But this general impression cannot be confirmed or set aside without further in-depth review, which is not mandated by the terms of reference of this review.
- 4. Program Development:** ASPR documentation leaves the impression of responsive programming mindful of LDC priorities. This presentation of self cannot be checked without input from the principals of the recipient projects. An effort to gather such information through the Internet from 17 of the project contacts provided by ASPR PIT failed to produce a single response. The findings of the in- depth case study of the SPN/WCA are very disturbing in this regard: The second phase of the SPN/WCA was completely reengineered following ASPR framework specifications and abandoning the efforts to make the work of the network responsive to priorities identified by multi-partner national fora.
- 5. Relevance:** The ASPR's focus on the assessment of social policy reforms and the sectoral approach it takes to this mission severely limits its relevance to the holistic sustainable and equitable development framework of IDRC. It categorizes its activities as relevant to two themes: Integrating Environment, Economic and Social Policies (CPF I) and Strategies and Policies for Healthy Societies (CPF II). Both these themes require a holistic frame of reference effectively to deal with their complexities. ASPR research might be seen as relevant to the integration of social policy into the dominant economic paradigm, which is not an optimal approach for making significant contributions to either of these two themes. While the case studies of RRPSPR – ESA and RRPSPAII deal with issues relevant to social policy reforms in their regions the actual studies tend to have a narrow sectoral focus that made it difficult to determine what value they would add to routine program evaluations.
- 6. Reach:** ASPR activities regularly involve researchers and program managers, occasionally it also involves sectoral policy makers, seldom does it involve civil society, communities or the general public. The sectoral micro focus and the linear models of research and of knowledge dissemination, combined with the institutional network approach limit its capacity to transcend the structural obstacles to effective reach for its work.
- 7. Potential Impact:** The profile of the ASPR that emerges from the above findings clearly restricts its potential impacts on social policy reforms to the fine tuning of existing policies that could be done on the basis of micro findings. In rare cases such research might lead to the consideration of alternative policy choices but the probabilities are not high for such impacts. It is not clear that ASPR sponsored evaluation research into social service delivery and social policy reforms add value to the evaluations that are conducted routinely of these government operations by international donors and their national counterparts.

Conclusions and Recommendations

Given the constraints of time, the limitations of the data sources, and the difficulty of communication due to the high level of mobility of the two development practitioners involved in this review (even with e-connectivity), it was not possible to formulate a joint set of conclusions and recommendations. The cases we reviewed individually differed widely and generalizations by the reviewer involved required interpretations that are difficult for the other to appreciate fully and to share. For these reasons we present our conclusions and recommendations separately. We see them as consistent and complementary and we endorse all of them. The main difference is this: Naresh Singh's conclusions and recommendations do not raise the question of the continuation of the ASPR, but recommend major rethinking of its approach. Jan Loubser, based on his perspective and the case material he reviewed, questions the wisdom of the continuation of the PI and recommends that it be phased out or reinvented along more holistic lines. He also recommends an urgent management review of the SPN/WCA.

REPORT ON AN EXTERNAL REVIEW OF THE PROGRAM INITIATIVE ON ASSESSMENT OF SOCIAL POLICY REFORMS (ASPR)

I. PURPOSE OF REVIEW

This review is based on an interpretation of the terms of reference that varies slightly from the one intended by the IDRC. The terms of reference of the review were designed to focus primarily on specified features of the PI, examine them and assess their quality, quantity and relevance. In this review these features of the PI are used more as a composite screen than a focus. The review looks at the PI through the screen of these features in relation to the larger picture within which it fits, within IDRC, the contemporary global context, development paradigms and societal development perspectives. This interpretation enlarges the meaning of relevance somewhat to avoid failing to see the forest from the trees. It was apparent early in the review that the issues that the ASPR raises are not so much whether it performs according to its mandate, but whether this mandate was optimal from a range of macro perspectives, including IDRC's mission.

A review that stayed within a strict interpretation of the terms of reference would have been an exercise in futility and a disservice to the IDRC. The purpose of this review is rather to provide a frank assessment of the ASPR from an explicit values perspective that is believed to be intrinsic to the mission of the IDRC as defined in CPFII.

II. THE ASPR PROGRAM INITIATIVE

Please see the ASPR Annual Report 1998 – 1999 for the most current description.

III. REVIEW APPROACH AND METHODOLOGY

The approach of the review was concerned more with quality than quantity. Answers to questions on how many outputs were produced, whether these outputs were timely and met specifications were pursued as part of the qualitative review without time consuming detailed tallies of numbers and dates and sizes. Qualitative questions had less to do with criteria of scientific excellence or even soundness than with contribution to knowledge on the subject, appropriate focus of application, relevance to improving people's wellbeing, relevance to policy makers, decision-makers and public participation and sensitivity to macro policy issues.

With regard to the work breakdown structure, apart from dividing the case material of sampled activities between them, both reviewers concerned themselves with the ASPR as a whole and its review as a PI. Originally the following activities were selected for review after consultations in Ottawa with the ASPR team (NS = Naresh Singh and JL = Jan Loubser): 93-8758: Social Policy Evaluation (NS); 50256: Monitoring and Evaluation of Poverty Alleviation Program (Peru) (JL); 03930: Réseau de recherche sur les politiques sociales en Afrique de l'Ouest et du Centre (SPN/WCAII) (JL); 03129:

Regional Research Program on Social Policy Reforms - East and Southern Africa (RRPSPR-ESA) (NS).

In addition, we requested documentation on the following activities so that we could review them, if time permitted: 03130: Education, Equity and Economic Competitiveness in the Americas (NS); 50140: Regional Research Program on Social Policy Assessment: Phase II (RRPSPAI) (NS); 03012/04314: Youth Livelihoods (NS); 03526: Social Sector Decentralization - South East Asia (JL); 50176: Decentralization and Social Policies (JL); 50221: Social Policy Decentralization: A Regional perspective (JL).

Naresh Singh reviewed RRPSPR-ESA (03129) and RRPSPAI (50140). Jan Loubser reviewed the SPN/WCAII (03930) intensively and all the other activities more selectively to check out findings of the intensive review, rather than to duplicate it. All the documentation for activity 50256: Monitoring and Evaluation of Poverty Alleviation Program (Peru) was in Spanish with the exception of the proposal and a recent policy brief with the result that the kind of review required by the terms of reference was not possible. This was also a problem with regard to the review of RRPSPAI, but more adequate documentation was available in English. Neither of the reviewers could review material in Spanish, which limited quality assessments of work in Latin America.

An effort to sample the opinions of the ASPR's main recipient partners turned out to be a lead balloon. Questions sent by e-mail to seventeen of the program and network principals did not produce a single substantive response. In spite of a reminder after two weeks, only three people promised to respond, but they never did. No conclusions shall be drawn from this limited experience. The PITL had advised that ASPR's partners might not be familiar with the internal documents of IDRC and that responses might be limited. The question list was open-ended and the reminder again invited any relevant comments independent of the questions proposed, but to no effect. (See Annex 2 for documentation on the process)

A word on value position. There is no claim that this is an objective review report strictly based on 'empirical evidence'. We do not believe in value-free science, social or otherwise, and we do not try to fake objectivity. Our biases will be clear and can easily be discounted by those who do not share them. We believe that we offer an interpretation of the ASPR, based on the evidence we reviewed and the perspectives we have on the current development problematique, that is credible, defensible and as valid as any other perspective.

The expectations we brought to the review were sharpened by John Hardie's brief piece on "The Program Initiative System in IDRC: Origins and Rationale." We looked for

- evidence of awareness of the limitations of the dominant scientific paradigm of the twentieth century and for efforts to transcend it that amount to more than treating multi-disciplinarity as a panacea.

- interactive knowledge communities working in interconnected networks nationally, regionally and globally that link knowledge to policy to practice to reflection to change and transformation in a seamless web-like way.
- a concern with people and their wellbeing as a core value rather than targeting them as poor or disadvantaged or women and as objects of programs and projects and policies, or as producers of indicators to statistical formulae or microeconomic models.
- an understanding of social policy, its scope, limitations and promises, informed by the global consciousness created by the international conferences of the nineties and the emerging paradigm of development that puts people at the centre of development and society, and the economy at their service.
- cutting-edge research in niche markets of knowledge in the search for advances in social equity and the wellbeing of all, that is prepared to give the lie to conventional approaches and to turn official policy stances on their ear to make a difference in people's lives.

The report addresses the various aspects of the ASPR as required by the terms of reference. A separate report on the review of SPN/WCAII appears in Annex 1. Some of the findings are woven into the review of the ASPR itself along with those of the other case studies.

A final section presents conclusions and recommendations.

IV. REVIEW FINDINGS ON THE ASPR

1. Approach

As one reads the prospectus and other documents of this PI, one gathers an increasingly distinct impression of a programming framework stuck in a groove, incapable of breaking out of a paradigm that is rapidly losing its currency in order to fit into the new paradigm emerging in IDRC's CPFII and elsewhere. This is not just a paradigm of development, but also one of knowledge or knowing and of the diffusion of knowledge and know-how.

It is easy to be misled by the title of this PI to expect something that it is not designed to deliver. Assessment of social policy reforms could be made from several perspectives. One that readily comes to mind would be policy research that focuses on the macro level and examines policy options, alternatives and determinants taking into account key parameters that are country or region specific. Another is to assess whether programs and operations achieve declared policy objectives for given policies, if not, why not and what needs to be done to improve effectiveness and efficiency. A third would focus on policy impacts and would examine whether core societal goals and values, such as equity, universality, inclusiveness, the wellbeing of all, are achieved through the results of the current policy mix (social, economic, environmental, cultural, governance) and what alternative mixes could be explored to improve the society's effectiveness in achieving the wellbeing of its members. Each one of these approaches could be pursued at the

macro, meso or micro level. Assuming for the moment that these possibilities define the property space within which we need to locate the ASPR, we get the following matrix:

Level of Analysis	Focus of Analysis or Research		
	Social Policy Options	Social Program Operations	Policy Mix to achieve societal goals
Macro	None	None	None
Meso	ASPR: little	ASPR: most	None
Micro	ASPR: some	ASPR: most	None

There is some language in the ASPR prospectus that would lead one to question this location of ASPR programming in the matrix of major possible approaches. Once one has achieved agreement on what would be the best fit for current ASPR programming within this space one could then ask: Is this optimal? Can it make the best contribution to IDRC's PI objectives or themes from this vantage point? It could be argued that the biggest challenges in realizing the type of development that IDRC espouses as reflected in the CPF II, lie in the boxes that ASPR leaves empty in this matrix. We will review the evidence to shed light on this issue.

The concept of social policy and social policy reform that informs and defines the ASPR approach is deliberately set at the meso level with further focus at the micro-level. Macro social policy issues are ignored with the result that the macro-economic framework within which social policy reforms are often initiated, is taken for granted. This is reflected in the preoccupation with social policy reform rather than social policy formulation and design, independent of reform considerations, as well as in the types of reforms that are identified: decentralization, privatization, targeting and fees for service. The movement for social policy reforms took its departure from the macro-economic agenda and its structural adjustment programs with their disastrous effects on social dimensions in most countries. While the development of the sustainable human development paradigm is recounted as a corrective for the economic determinism of the dominant development paradigm, it is not clear whether the rationale for the ASPR is derived from the former rather than the latter.

It is surprising, for example, to find no reference to the World Summit for Social Development (WSSD) in the development problematique of the ASPR Prospectus. The WSSD clearly recognized the inadequacy of the development paradigm that focuses on economic growth and treats social and environmental concerns as add-ons. It called for an integrated or holistic approach that treats economic, social, environmental, political and cultural development together as inseparable elements of societal development.

It articulated the holistic people-centred paradigm that already emerged in Rio in 1992 in much more explicit terms: the empowerment of men and women in communities and the creation of enabling environments for their effectiveness in pursuing their development objectives. It spelled out principles of inclusiveness, universal human rights, gender equality and equity, the right to development and the eradication of poverty and other

forms of destitution. It spelled out principles and approaches to governance to achieve this type of people-centred development: decentralization, participatory decision-making, community empowerment, partnership with civil society and the private sector and increased transparency and accountability through freedom of expression and access to information. It called for the creation of enabling environments at all levels, including the global level, to foster people-centred development and to eradicate poverty. It set out certain targets in human wellbeing that must be achieved in education, health, employment and livelihoods, and social integration to ensure the full development of human potential and the wellbeing of all. It was not preoccupied with the social policy reforms that were in vogue at the time and were largely related to the agenda of the BWIs and the Washington consensus.

The ASPR does not appear to be informed by the WSSD commitments and program of action. This is curious in the IDRC that became the Canadian flagship for sustainable development after Rio and included the concern for equity in its resultant mandate. One could argue that it is for this reason that IDRC did not need to pay special attention to the WSSD: It was already doing the kind of development that Copenhagen mandated. If that was the case, the ASPR would not appear to be the bearer of this banner. Granted it supports a lot of research on equity in the social sectors, but mainly within the social policy reform context where equity is an after thought or a secondary agenda. It reflects a surprisingly narrow concept of social policy as mainly dealing with the social sectors and the delivery of services within them. The Prospectus states, for example, that the ASPR's approach to social policy reform 'takes as its starting point existing social policies and priorities, and analyses the contribution of other policies, such as fiscal reform, to the achievement of social policy priorities' (p. 4, emphasis added). The choice of example here is telling as social policy priorities have seldom if ever been an objective of fiscal policy.

In articulating its relation to the CPFII, the Prospectus states that the ASPR will promote sustainable and equitable development 'by enhancing human and social development through more effective policy making in social sectors.' The focus on the sectoral level of social policy is consistent throughout with little attention to the macro policy environment and its social dimensions within which sectoral policies are developed. Commenting on the first draft, the PIT explained that this is a corporate policy, not a PI one. No reference to such a policy or strategy could be found in the CPF that treats sectors and disciplines as almost synonymous, stating:

In pursuing these objectives, IDRC has defined its programs in terms of development issues and the knowledge required to address them, rather than in terms of traditional disciplines such as economics, health, or agriculture. In this way, the Centre intends to practice and promote a holistic approach to the use of knowledge resources for sustainable and equitable development. (p. 14)

This sectoral approach could have crippling effects on the potential relevance and impact of the ASPR. While it would allow for ad hoc consideration of the interrelations among social sectors and of societal values that inform social policies in all sectors, such as

equity, universality, inclusiveness and diversity, there is no systems approach, let alone a whole-systems approach, to the development of society. This could inhibit the consideration of the synergies that could be achieved through coherent social policies across sectors within a macro societal policy framework.

The other dimension of this is that a sectoral analysis of measures such as decentralization (also treated as a reform) fails to deal with the decentralized system of governance of the country and its strengths and weaknesses. Decentralization is a governance system issue that cannot be adequately addressed within the confines of a particular sector, such as health or education. It is a system of governance affecting most dimensions of local life and involving many partners. The amendments to the Indian constitution, for example, empowered local community institutions as governance institutions with 29 different areas of responsibility. The local community must not only manage health services, but all services, as well as the local economy, culture and society. The local community cannot do this by participating in or responding to the schemes and programmes of twenty different central or deconcentrated sectoral agencies. It can do this only by becoming self-organizing and self-steering within an environment of adequate delegated autonomy, devolved powers and access to the necessary resources. The ASPR's preoccupation with social sector decentralization as a reform issue prevents it from dealing with this local complexity in which a local community must make sound decisions about the total wellbeing of all its members, and with the system dynamics involved. An evaluation of the Health for All strategy found that two of the main reasons why it failed to achieve its targets were that health sector officials failed to develop a holistic approach to primary health care and that communities were not effectively empowered with the management of their own health (See WHO, 1996)

Effective decentralization involves a system of layers of responsibility and accountability, arranged according to principles of sound governance, such as equity, effectiveness (subsidiarity), universality, inclusiveness and democratic voice. When analysis is carried out from a sectoral perspective it is necessary to ask: Are there principles that apply across sectors, or is the sector left to its own devices? Whether we look at social policy horizontally (involving all sectors) or vertically (involving all levels of governance), or indeed diagonally (involving all sectors at all levels), only a whole systems approach to policy formulation and a holistic approach to service delivery and development management more generally can deal adequately with the complexities. Also in India, a convergent community action strategy, developed in collaboration with UNICEF, was adopted by the Rural Development Department to provide a one-stop delivery focus for all sectoral agencies dealing with or providing services to the community, with accountability to the community itself (See Government of India, 1997).

2. Program Delivery Mechanisms

The ASPR identifies a sectoral approach to research, integrated project development and networks and research programs as its program delivery mechanisms.

The **sectoral approach to research** is mentioned first, consistent with the general approach to social policy reform that sees it as focused on the social sectors. The limitations of this approach have been commented on above.

The second mechanism, **integrated project development**, concentrating on multi-disciplinary or multi-institutional teams, is said to optimize resources and facilitate exchange and dissemination of information among sectors, institutions, countries and regions. It is unclear how cross-sectoral dissemination will happen if the research approach is sectoral. One would have thought that this would also require a multi-sectoral or cross-sectoral approach to research. The case material suggests that multi-disciplinarity tends to be treated as a panacea, as the sine qua non of sound, integrated, relevant research. In fact, many efforts at multi-disciplinarity have been ineffective because of inadequate attention to the need to learn together to transcend disciplinary boundaries and frames of reference. The special creation of multi-disciplinary teams and networks to pursue PI objectives, as opposed to relying on ones with a proven track record is perhaps the riskiest research strategy to follow. (See Annex 1 for a case in point)

The third mechanism, **networks and research programs**, focuses on regional networks of research institutions and programs. Here Jorge Balan's comment on the differences in flexibility and adaptability between institutional networks on the one hand and individual researcher networks on the other hand, is well taken (Balan, 1998). While institutional networks probably would produce more predictable research results and achieve certain economies of scale in research management, the degrees of freedom lost in regard to variety, spread, relevance and reach across many institutional and discipline boundaries are probably quite significant. This is all the more true today with the highly cost-effective connectivity that the Internet provides to researchers everywhere. The kind of analysis that Kevin Kelly has made of the "Network Economy" could probably also apply in many respects to "network research" (Kelly, 1998). The research networks fostered by the Internet will be radically different from the institutional ones built and sustained by ASPR. They are likely to outperform them hands down in terms of creativity, innovation, serendipity, relevance, reach, penetration and pertinence to micro-environmental issues in all policy fields, precisely because they facilitate bridging the institutional gaps that separate researchers from policy makers, development practitioners, service deliverers, beneficiaries and other users and actors. And they are likely to feed much larger networks of social interconnectedness within and across these categories.

To test these assumptions in a limited way, some exploratory search on the Internet was done. A search for 'health policy reform' led to AFRONETS (www.healthnet.org/afroNETS), a web site for networks in Southern Africa concerned with health. IDRC is listed as a partner but one selects it only to arrive at the home page, rather than the social development page or the LACRO page. Two other partners of AFRONETS turned out to be much more exciting: Scientists for Health and Research for Development (SHARED: <http://www.shared.de>) and the Network for Equity in Health in Southern Africa (EQUITY: <http://www.equinet.org.zw>). It was reassuring to discover in the latest annual

report of ASPR that it supported the development of this site. Both these sites are interactive and allow for communications among researchers other than document research. The latter in particular is a good example of a web site that can facilitate and mobilize the kind of seamless communication and interaction involved in the blending of knowledge and action in non-linear, holistic ways. Another network on Social Sciences and Medicine in Africa is relevant to SPN/WCAII and other ASPR networks (<http://users.harare.iafrica.com>).

Two other sites are worth mentioning: Management Sciences for Health's Electronic Resources Centre (<http://www.erc.msh.org>). This site has several interactive lists on research topics including "decentralization in health" that has 300 participants from 40 countries. It also has pages on 'Managing Health Sector Reforms' and 'Health Policy and Reform'. It provides links to AFRONETS and FRAC (Le Forum Regionale d'Analyse et de Concertation), that is the second site referred to above. It is an electronic network in Francophone Africa focusing on reproductive health and addressing many of the issues of concern to SPN/WCAII.

All this goes to confirm that the emphasis on connectivity in ASPR and the PI's more generally is well placed. However, the IDRC sites visited and the statements about the importance of connectivity suggest a somewhat limited vision of the potential of the Internet and of e-research. Most of the IDRC sites are passive electronic 'library' or 'archive' or 'information centre' type sites where one goes to find information, a document or a database. They do not provide opportunities for interaction and for the cumulative exploration of mutual interests among researchers and others, for the "virtual research communities" that Hardie mentions. There are links to individual e-mail addresses, but they all lead to private conversations or exchanges with no cumulative discourse or dialogue. The one exception to this might be RIADEL where the evaluation study documented the e-mail correspondence with the network. But my limited understanding of Spanish suggests that this is more a compendium of an e-mail stream of individual communications than of group discussions of substantive topics. The Electronic Resources Centre of Management Sciences for Health (ERC), The Network for Equity in Health in Southern Africa (EQUINET) and SHARED (Scientists for Health and Research for Development), sponsored by the European Community are examples of dynamic sites that promise to facilitate e-research and e-interaction among all stakeholders on any particular topic.

A check on PAN led to PANASIA as the most developed example of the program. PANASIA comes close to a dynamic site with its interactive conferences. After registering for the International Communications 2000 conference that has been running since April 14th I found only 25 people registered and only one posted message dealing with science fiction (after two months)! But PAN has sponsored other interesting sites such as the Philippine national net (TABOAN) and no doubt others that any reliable sampling would reveal. The point is that PAN represents the potential concept for e-research networking that provides the 'software' to complement Unganisha's mainly 'hardware' for facilitating true interconnectivity for e-research. (PANASIA has an e-commerce link, but not an e-research interactive capability.)

In summary, the institutional networks sponsored by ASPR are likely fast to become sub-optimal mechanisms for the purposes for which they were designed, if they are not already so. As such they are expensive, high-risk investments in institutional forms that might not have the capacity to achieve their goals and significant returns in the fast moving world of global flows of information, knowledge and learning randomly accessible through the Internet from anywhere. This is a chaotic world that challenges the efficacy of our linear knowing and doing models that are still firmly institutionalized in governance and knowledge institutions alike.¹

3. Program Implementation

The implementation of the ASPR appears to have been efficient and effective, building as it did on decades of experience in the social policy field and dealing with partners who were known entities in many cases and who were familiar with IDRC. However, the scope of this review is too limited to be definitive about this aspect. The case of SPN/WCAII that was examined in some depth casts doubt on such a conclusion (See Annex 1). In the case of the Regional Program on Social Policy Reform – Eastern and Southern Africa (03129), there was clear evidence of networks of research and policy institutions being formed. However, there were no examples of what might be considered the key expected outputs foreseen in the PI, i.e. Policy briefs, Training Manuals and Policy Dialogues involving a mix of actors. In the case of the Regional Research Program on Social Policy Assessment Phase II (50140), the outputs included research reports, policy briefs, interim technical report and bulletins. Training manuals and networks of policy institutions were not developed or at least not described in the policy briefs reviewed. Greater attention must be paid to comparative evaluations and “best practice” studies, in which this activity is weak.

The parameters of this external review do not allow reliable generalizations about the quantitative aspects of PI implementation as the reviewers are almost completely dependent on the overall reports of the PIT and case material cannot be selected on a representative basis.

4. Program Development

The development of the ASPR purports to have been in response to developing country priorities. It is difficult to assess the extent to which this was indeed the case. In the case of the sample programs examined there were definitely consultations with regional stakeholders in the targeted sectors or issue areas. What is less clear is the extent to which there were real options available to those who were consulted, whether alternative scenarios were considered and how the choices were narrowed down to those eventually chosen. For the PI approach to programming research to retain a modicum of the

¹ IDRC managers might be interested in examining the relevance – among others - of Stephen Rhinesmith's *A Manager's Guide to Globalization* (Irwin, Chicago, 1996) to the management of research in the emerging global context.

responsiveness to LDC priorities that once was the hallmark of IDRC, the processes of consultation, involvement and engagement have to be transparent, open, systemic and empowering. But the PI approach makes the achievement of responsiveness and relevance that much more difficult, unpredictable and subject to fudging, if not manipulation.

The development of the second phase of the SPN/WCAII provides a sobering example of this. Here was a fledgling network that was organized to optimize relevance to national priorities through a holistic approach to social policy research. It was slow to get organized, partly due to IDRC's red tape and the inevitable delays involved in regional synchronization of disparate activities by inexperienced research teams. As a network with a specific set of objectives it was floundering and the findings of the evaluation report provided a strong basis for cutting losses (See Ouedraogo, Oct. 1997). But the recommendation was to throw more resources at the network – a full-time regional coordinator, more institutional support for national teams, more connectivity – and to support a sectoral programme of research that would have all countries address the same topic through similar methodologies in order to consolidate the network and concentrate capacity building in this one area.

The second phase neatly addresses ASPR objectives, adopts ASPR approaches and seeks to produce ASPR outputs. Its priorities no longer arise from the national fora of the first phase, but from a regional seminar for the research teams that was held before their first phase results were shared with their original national fora stakeholders. The ASPR framework and the proposal for Phase II were presented to the seminar. And ASPR relied on the same individual consultant to evaluate the first phase, to design the second phase and then appointed him as the new full-time regional coordinator. This might indeed be a winning formula, but it is a high risk one and the evidence so far is not reassuring. The national teams dutifully repeated the regional program objectives and hypotheses in their proposals, but there is little evidence of research designs that will produce meaningful results.

The choice of research subjects seems driven by the requirements of a linear concept of the production, transfer, diffusion and utilization of knowledge. Similarly, a linear concept of the formulation, implementation, evaluation and adjustment of policies as being knowledge-based seems to be assumed with policy makers and program managers seeking out relevant knowledge to improve their policies and programmes. These linear concepts have nowhere proven more limited than in social policy analysis and formulation (See Annex 1).

The review of the selected activities suggests that most of the work funded by ASPR could perhaps better be classified as operations research or program research than policy research. The second objective of the ASPR to develop methods, instruments and indicators for assessing the impact of policy reforms explicitly focuses at this level. In fact, the research team of the South East Asia Policy Decentralization Project (03526) acknowledges that they are doing operations research and development.

But the assessments of policy reforms, such as decentralization, are also of this genre, making it difficult to find significant differences between the type of outputs produced and those of evaluation research that forms an integral part of the program management cycle. For example, the Peru project (50256) that developed monitoring and evaluation instruments for a poverty programme, focused on how to fine tune the operations of the poverty programme rather than to ask questions such as: Does this policy choice work? If not, why not? What alternative options are there? But of course policy makers are not really interested in these kinds of questions. This research seems to have confirmed what is generally known that extreme poverty is highly heterogeneous and multidimensional even within geographic pockets, and that multi-pronged, integrated or holistic approaches work better than monolithic, linear ones. This knowledge also casts doubt on one of the pet ideas of the social policy reform agenda - better targeting - that seems to inspire both the Focused Extreme Poverty Program of Peru and the ASPR sponsored research itself. The same knowledge supports an alternative approach empowering communities to maintain and strengthen their traditional and informal safety nets that are naturally targeted and building their self-reliance capacities. Policy makers seldom give due consideration to this option, no matter how clear the evidence of its effectiveness and sustainability.

5. Relevance

There are two issues of relevance: to the PI framework and to the priorities of the countries and regions involved.

a. The PI Framework

The foregoing analysis of the ASPR's approach is indicative of the extent to which it can be seen as relevant to the CPF II. Of course, the ASPR is just one of several PI's that relate to the more holistic CPF II and its themes. But its approach does not appear to maximize its potential contribution to themes like "Strategies and Policies for Healthy Societies."²

A sectoral approach to social policy and a focus on social policy reform assessments is clearly not optimal within the holistic framework and strategy of the CPF II. What is needed is a societal approach that addresses the macro issues that must guide social policy development, which would have more to do with synergies with other macro dimensions, such as the economy, environment, culture and society itself, than with

² It is worth noting that the World Bank has recently joined the UN System in advocating a more holistic approach to development. Mr. Wolfensohn has translated his call for a holistic approach to the crisis in Asia in his speech to the Governing Board last October into a Comprehensive Development Framework that the Bank proposes to test in 10 countries over the next two years (Wolfensohn, 1998 and 1999). At the same time, Joseph Stiglitz, Senior Economist and Vice-President, has called for a new paradigm of development that recognizes that development involves the transformation of the entire society and has pointed out that this type of development can only come from within through the widest possible participation by the people at all levels. He roundly criticized the Washington consensus for its narrow focus on economic development and acknowledged the social ineptitudes of structural adjustment programmes and the social damage they often caused (Stiglitz, 1998 and 1999).

particular sectors. Only then can the hegemony of macro-economic policy prescriptions in social policy reform be systematically neutralized by coherent designs that create system-wide synergies in the pursuit of the realization of the society's values and vision.

Another symptom of this lack of a societal perspective on social policy is the absence of any research or other activities to address these issues. This is particularly surprising as the fourth core area of research of the ASPR, namely the analysis of the determinants of social policy choices, would provide a natural context for addressing the critical issues around the values that have dominated in social policy reforms. The assumption that these reforms were inspired by values of equity, basic needs and poverty alleviation is simply naïve. These belatedly introduced concerns have not provided a coherent people-centred value base for social policy design and development and have not led to significant reforms of the reforms. There is little evidence of ASPR being aware of or alert to these issues. In stead it intends to research the relevance of traditional values and cultural patterns, as embodied in the role of traditional leaders, to social policy reform choices in Africa, Latin America and Canada. In comments on the first draft, the PIT claimed that it is simply responsive to the research priorities of its partners and that values are not a priority issue for them. However, in the SPN/WCAII case ASPR deflected the research interests of the network away from a holistic, values-based agenda to a narrow focus on the evaluation of health sector reforms in all countries (See Annex 1).

In the case of the CABIN component of Project 03129, the bulk of the material reviewed can be considered peripheral or at best indirectly related to the PI objectives and its performance targets. This program while no doubt making a useful contribution to NGO capacity building is not focused on NGO capacity building for social policy reform research or advocacy. Much greater focus and clarity are required with respect to CABIN's goals and their relationship to the ASPR. An appropriate entry point to assist in the program revision, refinement and focusing could be the WSSD (1995) declaration which was quoted by Dr. Kinyanjui at the regional workshop held in Mombassa (April 1997) and attended by 42 participants representing 27 NGO's based in East Africa and 2 from Canada:

“Reinforce as appropriate, the means and capacities for people to participate in the formulation and implementation of social and economic policies and programs through decentralisation, open management of public institutions and strengthening the abilities and opportunities of civil society and local communities to develop their own organisations, resources and activities”

b. The priorities of the countries and regions

In the case of the RPSPR-ESA, the studies were carried out and the findings presented are highly relevant to health care decentralisation and privatisation in these countries and could serve to improve these activities by pointing to where key additional capacities need to be built for the success of these programmes. Each study can be viewed as a combined ex-post evaluation and a forward looking assessment of that specific activity

and in these regards the studies are successful and contribute to the PI objective to assess various approaches to social policy reform options. However, their contribution is narrowly confined to the option being studied and because of a lack of cross-option studies using a variety of policy assessment methodologies, the studies do not achieve much more than any good project evaluation exercise would. Such an evaluation would normally be an intrinsic part of the full project management cycle of any properly designed project. The justification for these studies as independent research activities then becomes highly debatable.

In the case of the RRPSPAI, the activities undertaken represent a wide range of important social policy reform issues in Latin America and as such are highly relevant to the overall thrust of the Prospectus. From the evidence obtainable from the policy briefs, it appears that in most cases there was not much engagement of the range of stakeholders affected by the activity. The approaches used usually demonstrated high levels of technocratic design rigour, e.g. in the actuarial and econometric models used in the Uruguay project or in the rational and incremental policy formulation models used in the Peru project, but these were not complemented by participatory and multi-stakeholders processes. While a review of the research reports might reveal a different level of stakeholder involvement, it is not unusual for good technocratic approaches to ignore more participatory approaches and attention here might well help to improve the ASPR in general.

6. Reach

IDRC's mission statement "empowerment through knowledge" suggests a powerful dynamic that reaches from central policy makers to the grassroots, empowering all stakeholders and partners at all levels in all spheres or sectors. This would suggest a three-dimensional space within which those reached could be located, with the types of stakeholders (policy makers, opinion makers, researchers, development agents, communities, citizens or people), the levels of society (central, regional, local) and the sectors (public, civic and private) as the main dimensions of direct relevance. It would be interesting to know how the reach of the various PI's would be scattered within this space and whether that is the optimal mix for the Centre's effectiveness.

As far as the ASPR is concerned, it appears heavily biased towards central government policy makers, institutional researchers, and direct stakeholders in their activities and programs. There are activities focused on the municipal level and ones that involve NGO's directly, but the main preoccupations are with social sectoral policy makers and program managers. The latest annual report notes that the SPN/WCAII has not as yet explicitly explored the active involvement of civil society actors. But this is not a sequential issue in a linear process. It is mainly when it comes to the diffusion or dissemination of research results that the other dimensions of the space come into play. Another dimension of reach that is difficult to assess is gender. The documentation reviewed contains a tally of the number of economists involved in various networks, programs and projects, but no such accounting is apparently expected by management with regard to women.

The policy briefs of RRPSPAI are useful outputs with high potential reach for policy-makers. However, the evidence available does not allow an evaluation of reach and consequently nor of impact. In general, these activities are well-designed top-down technocratic investigations that can all benefit from participatory and multi-stakeholder approaches. The Peru project deserves special attention as perhaps coming closest to the spirit and ambition of the ASPR in its methodology, its results and in their presentation.

In the RPSPR-ESA, in each of the studies reviewed, there is good evidence of the participation during the study of a range of “representative” stakeholders and in some a triangulation methodology is utilised to reduce contradictions in the data that can result from multi-stakeholder processes. However, there is much less evidence of any engagement of the researchers and the stakeholders whether policy-makers, health care recipients or health care delivery personnel during the design phase of the study. The findings of these studies have apparently not yet been used or implemented and so we cannot at this stage comment on stakeholder engagement in the follow through.

Since these studies are mostly just completed and their results not yet being used for specific interventions, their reach is difficult to assess with a fair degree of objectivity. The involvement of some stakeholders in the conduct of the studies could be considered as “reaching” them, but any resulting changes in their behavior cannot be assessed on the basis of “outputs”.

While it is possible that some policy makers might already be using the results of these studies and impacts might be resulting, the documents available do not allow such an assessment at this stage. However, while the reports are largely outputs and they do discuss the mechanisms for reach of the policy reforms, e.g. the mechanisms for reach by local council Health Committees and Health Unit Management Committees, they do not discuss how their findings can best reach their intended users, who these are and how and when they were brought into the study. Such information would help set the stage for an assessment of future reach.

7. Potential impact

It is not difficult to see that the ASPR could have significant impacts on social policy reforms. The research topics certainly appear to address issues at the micro level that are subject to manipulation and alteration by program managers. And in the case material examined more closely policy makers or program managers were indeed involved in the selection of the research themes and subjects and committed to examine the policy implications of the findings. But there are many a slip between this cup and the lip of improving social policy effectiveness and people’s lives.

There is a nagging unease about the probabilities that these impacts will materialize, that they will be significant and that they will make a difference in the effectiveness of the policies in question in improving people’s lives.

The overwhelming impression one gets from the research reports reviewed and the description of program objectives of other activities is that much of the research supported by ASPR resemble the objectives, nature, methodology and scope of the type of evaluation studies that are integral to the program management cycle. Even if this research was of high quality, pertinent to the concerns of program managers and would predictably be brought to their attention in decision-making rather than discussion contexts, the potential impact would still be hard to predict. This is so because the equations that program managers use to manage, evaluate and adjust their programs are multi-variate with knowledge or information about what is actually happening on the ground only one of many elements that they take into account. And in the decision-making context the effective pressures are seldom favourable to the application of available knowledge or even in recognition of well-known facts.

In the light of these considerations the kind of anecdotal evidence of reach and impact that ASPR annual reports offer is far from convincing. Government officials may sign conventions, ministers may attend workshops, a report may be submitted to parliament, but in the end, what did they take out of the report and build into decisions and what difference did it make? Almost without exception, it is too early to ask firm questions about impact. The intent of these questions is rather to underscore the point that a linear model of policy influence that tries to produce results for the sake of accountability is likely to lead to endless fudging of probabilities based on isolated contact events. But is this really the way it works?

The other relevant observation here, given the focus ASPR has selected for its work, is that whatever impacts materialize, are likely to be at the operational levels of program design, service delivery and development management within particular sectors. If all the assumptions held, these impacts might well help to fine tune social programs and delivery mechanisms so that they achieve better social values. It would be interesting to assess in another five years what discernable impacts could be confidently and reliably assigned to all the massive research efforts that ASPR is supporting and has supported in equity in health, education and social security. We know now that it would prove impossible to factor out all the other influences that would have contributed to whatever equity gains were demonstrated. The chaotic, messy reality of social policy development and retrenchment must be accepted and factored in at the outset in policy and program design, rather than at the end of a linear process based on a very different set of assumptions that are out of sink with this reality. And it is completely unrealistic to build all the significant actors as stakeholders into the control mechanisms of the linear research-policy influence model applied by ASPR.

ASPR does this mainly by involving policy makers from the public sector, particularly the ministries directly involved, in its activities, assuming that this involvement will increase the probabilities of impact on policy. To a lesser extent, it seeks the involvement of NGOs and media exposure. But how about empowering through knowledge those who are at the receiving end of social policies and whose voice and concerns are seldom translated into effective vectors in policy decision making? At the moment they seem to

get the crumbs off the table of the researchers and policy makers through dissemination and publicizing activities.

What would happen if we assumed that social policy reform is people-centred and supported research on how this could be achieved effectively? What if we researched how communities could effectively be supported in improving their control over the key factors of their wellbeing and their sustainable, self-reliant development? What if the main strategy for social policy reform improvement was to stimulate public debate and involvement in policy formulation, participatory approaches at all levels in articulating policy choices and interactive, ongoing blending of existing, widely available knowledge, lessons learned and best practices into policy design and program delivery? What if we then supported research into the cutting edges of these whole systems processes to remove obstacles, create new opportunities and spearhead promising innovations? What if we empowered all key actors with simple reliable methods of ongoing self-assessment and self-correction in their own cycles of managing their development and lives and do further research on how to do this better? Most of this is implicitly possible and desirable in the IDRC mission, but is not reflected in the ASPR's approach and modus operandi.

The doubt about impact also stems from the fact that we are dealing with a very linear model of the relations between knowledge and policy. Jorge Balan's observations in this regard are worth recalling (Balan, 1998). His point is basically that the transfers are multiple and varied and mostly informal through the continuous search for relevant knowledge that most practitioners and development managers have to do to do their jobs reasonable well. The extent to which this happens and is effective has more to do with their training in relation to their job requirements and with informal networking than with their exposure to certain types of knowledge at particular points in time. This fluid model of knowledge transfer, almost by osmosis of social interconnectedness, is consistent with the network nature of knowing and doing that is going to expand exponentially with the advent of the Internet. The proverbial "old boys network" that worked so well not only in maintaining and perpetuating privilege, but also in channeling knowledge and information flows between policy makers and researchers, can now become a web of interconnections randomly accessible within countries and language communities. But it cannot be engineered and controlled in a linear fashion. The new connectivity that IDRC is so avidly and justly promoting and supporting has fundamental implications for the way it pursues its mission, the type of research it supports and the kind of influence it seeks to realize on policy, on the quality of development and life that result from it.

V. CONCLUSIONS AND RECOMMENDATIONS

Given the constraints of time, the limitations of the data sources, and the difficulty of communication due to the high level of mobility of the two development practitioners involved in this review (even with e-connectivity), it was not possible to formulate a joint set of conclusions and recommendations. The cases we reviewed individually differed widely and generalizations by the reviewer involved require interpretations that are difficult for the other to appreciate fully and to share. For these reasons we present our conclusions and recommendations separately. We see them as consistent and

complementary and we endorse all of them. The main difference is this: Naresh Singh's conclusions and recommendations do not raise the question of the continuation of the ASPR, but recommend major rethinking of its approach. Jan Loubser, based on his perspective and the case material he reviewed questions the wisdom of the continuation of the PI and recommend that it be phased out or reinvented along more holistic lines.

Following are Naresh Singh's conclusions and recommendations:

1. The focus of the ASPR on individual social sector policy such as health and education is as anachronistic as the concept of social development focused on these sectors. Social development is being used more and more to refer to "societal development" in a holistic sense and as such seeks to overcome the severe limitations of the sectoral approach, even when sector is used in a sector-wide sense. Social policy reform is so intimately tied to economic policy that the divide is artificial and a research program that seeks to be leading edge will have to embrace the issues of holism, complexity, gender, sustainability, participation, empowerment and equity in a public policy reform approach. Part of the research effort will have to be devoted to macro-micro linked and cross-sectoral policy analysis and formulation and how to do this in a world with sectoral institutions.
2. The ASPR must demonstrate that it is in touch with the latest cost-effective policy analysis and formulation techniques, which embrace a core set of public policy principles such as those, mentioned in (1) above. These techniques could include, for example, narrative policy analysis, critical theory approaches, etc. In complex situations, use of different (orthogonal) approaches, which are then brought together by triangulation techniques might be helpful, (see for example, Emery Roe's – Taking Complexity Seriously, 1998). In addition, it must have a clear strategy through which leading practice case material is being collected and lessons learned extracted and shared among researchers. In this regard, it would be useful to point out that research findings and lessons learned are usually quite different and should not be confused. IFAD (1998) in "What is a lesson learned?" makes a clear and useful distinction between finding, conclusion, recommendation and lesson learned. Using these distinctions, the research reports and policy briefs reviewed contain findings, conclusions and recommendations, but not lessons learned.

The social experiments approach should be examined (or re-examined) for its potential value to approaches used by the ASPR-PI. See for example: Larry Orr's Social Experiments – Evaluating Public Program with Experimental Methods (Sage, 1999).

3. It is recommended that the ASDR consider establishing a core set of principles with an evolving collection of strategies and methodologies through an interactive multi-stakeholder process.

The process could be initiated through a facilitated interactive workshop with a selected group of researchers and policy makers to discuss and define some core principles and context specific issues for the ASPR using some of the suggestions made in 1 and 2 above. Boothroyd's (1998) paper on the Establishment and the Underground, commissioned by IDRC should be used as a resource paper for the workshop. The workshop could also define a forward-looking virtual interactive process through which periodic updates of the principles, strategies and methodologies could take place.

4. Finally, the ASPR, through constant internal reflection and peer-review at both the corporate and project level, must strive to show what is the "research added-value" of the exercise being undertaken. Such added-value must be over and above what could be realised from well designed and conducted project evaluations, forward-looking assessments, and relevant existing research. Such added-value must be guided by what policy makers say they need to know as well as what researchers and intended policy reform beneficiaries think policy makers need to know.

Following are Jan Loubser's conclusions and recommendations:

The ASPR fails to embrace the holistic thrust of the CPFII. It relates most closely to the CPFII's second strategic dimension, namely, better economic management, whereas one would expect a closer relation to the first dimension, more human development, or people-centred development.

The latest annual report reflects an awareness on the part of the PIT that it might be time to shed the social policy reform agenda and move on to other issues. It reports:

The future program will move away from the assessment of reforms per se and focus more directly on modalities of social service delivery in health, education, poverty reduction, and social safety nets and their financing, monitoring and impact. This will be complemented by research on adapting methods and indicators for enhancing the effectiveness and efficiency of social services, and on ways to improve the governance, management and social service delivery capacity of national and local governments, communities and stakeholders. Attention will be given to synthesizing and disseminating lessons learned, best practices and innovations among policy makers and practitioners.

While the intention to move away from the reform focus must be welcomed, there is clearly no intention to address the concerns that this review has highlighted about the sectoral approach and the excessively narrow interpretation of social policy espoused by ASPR. If anything, there appears to be a stronger commitment to the linear model of research and paradigm of knowledge and policy linkages. The agenda remains centred on government operations rather than on people and their wellbeing. The knowledge produced might empower selected researchers and program managers but few other stakeholders and most probably not the people on whose awareness, knowledge and vigilance the effectiveness and potential impact of government actions depend more than on technocratic perfection.

The following recommendations deserve serious consideration:

1. That IDRC management ask itself the following questions:
 - What value does a focus on assessment of social policy reforms add to IDRC's holistic mission as defined in the CPF II and its successor?
 - If significant value-added was confirmed, could it be maximized by a sectoral approach focusing mainly on government service delivery operations?
 - Even if it could be maximized, could the IDRC's scarce resources justifiably be spent on research that responsible social sector program managers should build into their program budgets and buy off the shelf from competent suppliers? Who is cross-subsidizing whom?
2. That the ASPR be phased out or reinvented as a program initiative that produces the kind of cutting edge social knowledge that will provide a strong basis for public policy dialogue and broad participation by all stakeholders in policy formulation. Central to this would be community empowerment through appropriate knowledge of all factors critical to their effectiveness in self-steering towards their total wellbeing on a sustainable basis.
3. That the IDRC invest much more in e-research and e-dialogue on policy issues modeled on the best interactive web site designs it can locate or invent. This should include the complete reengineering of its current web sites and pages into hives of interactivity around the central themes of its holistic vision of development. It would also amount to a new kind of network approach that would foster virtual communities, not just of researchers, but of all stakeholders in an issue area, transcending the boundaries that bedevil institutional linear approaches.
4. That the ASPR PITL, in collaboration with the Evaluation Unit, launch an immediate management review of SPN/WCAII to confirm the quality, relevance, feasibility and viability of the current research program and other activities of the network and act firmly on the basis of the findings. (See Annex 1)

ANNEX 1

ANALYSIS OF A SAMPLE ACTIVITY:

Reseau de recherche en politiques sociales pour l'Afrique de l'Ouest et du Centre II (03930)(SPN/WCA)

1. Introduction

This activity was included as an example of a network that relates to performance targets 1 and 2 of the ASPR.

The SPN/WCA predates the approval of the ASPR Prospectus, the first phase having been approved in December 1994. The second phase falls more directly in the purview of the ASPR, having been developed within the context of the ASPR and approved in March 1998.

The assessment of this activity is complicated by the fact that the only results to date pertain mainly to the first phase, which predates the ASPR, and that the work of the second phase is just now getting under way. However, there are elements of both continuity and discontinuity between the two phases that may have something to say about the difference the ASPR has made.

2. Approach

The differences start with the formulation of the general objective of the activity:

The general objective of Phase I was to promote at the regional level applied research with the view to assist with the development of an integrated approach to social policies in order to facilitate a better understanding of the problems related to social development and to facilitate more effective decision-making by policy makers and planners.

In contrast, the general objective of the second phase is to develop at regional and national levels, by means of comparative research and on the basis of the work of the first phase, the knowledge, institutional and human capacities required to assist decision-making by the principal actors in the elaboration, implementation and evaluation of reforms in health policies. It also has as objective the institutionalization of the network as an autonomous regional African scientific association on a non-profit and sustainable basis.

In the specific objectives of Phase II it is further specified that the focus would be on the evaluation of the decentralization of health services in the eight countries.

The reasons for this shift in general objective are not clear since the problematique and the rationale for the network remain basically the same. . The rationale or problematique for Phase II is well developed in the proposal and reflects a good understanding of the

new dynamic that sustainable human development will require in Africa. The most coherent statement is provided by the current regional coordinator (Ouedraogo, Aug. 1998):

- The shift in the development paradigm from an emphasis on economic growth to one that is people-centred as articulated in sustainable and equitable development. The translation of this paradigm into reality would require social policies that form a coherent prospective ensemble of measures and actions that embrace all spheres of action (public, private, civic and community) and all sectors (political, social, economic, cultural) that are conceived in a global manner in order to satisfy the basic needs of people and to improve the quality of life of men and women in the context of the development of an indigenous society.
- None of the countries of West and Central Africa have an explicit social policy framework that serve as a guide to social programmes. The resultant sectoral approach has proven inadequate to improve the quality of life of people in the region where almost half live below the poverty line. This situation is not only morally unacceptable, but constitutes a serious threat to political stability, social cohesion and environmental sustainability.
- Society is increasingly becoming knowledge-based. The social sciences in Africa have a key role to play in facilitating the preservation and continued vitality of the African social heritage in balance with modern technology and society in the context of globalization.
- Despite recent developments, there is still a gap between the supply and demand of the results of social science research and weak utilization of such results as are there by the decision-makers and planners. This gap and the weaknesses on both the supply and demand sides are even more marked with regard to social policy research and analysis.
- The current context, particularly the consensus on, the dynamics and challenges of sustainable human development and the responses to these challenges by actors in all spheres, constitutes a favourable environment for the development of coherent social policies and for a reorientation of social science research to this end.

Given this assessment of the needs and priorities in social policy development of the countries in the region, one would not expect a proposal to focus on one sector in the evaluation of social policy reforms and one reform strategy, such as the decentralization of health services. The relevant documents suggest that the choice of this focus had more to do with responding to ASPR's framework and with the dynamics of the regional network of researchers. The need to find a formula that would consolidate the network, rather than with the type of research that would be most useful to the participating countries in improving their social policies, seems to have informed the choice.

3. Sectoral focus

The reasons offered for the choice to focus on health services and their decentralization are that the most exploratory studies exist in the countries on this matter, that health is of

central importance in human wellbeing, that it has shown the greatest progress and thus has the greatest promise for Africa, and that it is the sector with the most intersectoral implications. Decentralization of health services was chosen as a focus for several reasons: it is related to the democratization process, allows for the participation and interaction of all actors and strengthens social communication.

The objectives, however, are specific to the decentralization of the health sector, not formulated in terms of using it as a case of social policy and seeking to learn more about social policy reform or formulation. This appears to be a retreat from the integrated approach of Phase I into sectoral analysis, albeit from a multi-disciplinary perspective, in line with the ASPR approach. Elsewhere we learn that the choice was also made in order to consolidate the network by facilitating collaboration on the same subject and to carry forward a comparative analysis of it. It remains unclear how the broader objective and the *raison d'être* of the network will be served by this choice and what it will contribute to the understanding of social policy reform in the region.

The evaluation of Phase I recommended Phase II with essentially the objectives that were eventually approved. (Ouedraogo, 1997) However, it is not clear from the findings of the evaluation on what basis these recommendations were made and why they were accepted. The findings constitute a litany of weaknesses, delays, lack of performance, projected results not achieved, and so on. The evaluator concluded "It is in effect evident that the SPN/WCA in its present form is not viable because it does not perform..." citing evidence that half the national teams did not perform, the national coordinators did not provide leadership, the regional coordinator did not perform his terms of reference, the scientific mechanisms (committees) did not perform correctly, and the network had not been legalized and sufficiently institutionalized. He then proceeded to argue that the need for social policy research is greater than ever in the region and that there was no institution that could fill this demand. This latter claim was not documented with a review of which institutions actually exist and why, for example, an established network such as CODESRIA or the regional network on social and economic policies supported by UNICEF, could not be supported in efforts to fill this gap. Nor is it clear why it is expected that one institution, or indeed one network with closed membership, would be able to fill this gap.

In fact, the recommendations of the evaluation constitute a virtual reengineering of the network from its institutional and legal framework to its specific research objectives. Its resources and infrastructure are strengthened with a full-time regional coordinator and better institutional support for the national teams. And the focus of its purpose shifts from meeting national needs to meeting regional objectives, with all national teams addressing the same research problem with similar methodologies and with emphasis on regional and international political and scientific recognition.

All this would probably have made sense if there were evidence that the results of the first phase are being achieved despite the delays and other difficulties that are reported. Apart from the establishment of the regional network in the eight countries, the country teams were to produce two substantive results in Phase I:

- a) a state of the art review of social science research on social policy issues in the country, identifying lacunae and insufficiencies, providing a data bank on social policies in the sub-region, and
- b) a program of applied research with a global, multi-dimensional and integrated approach, based on the concept of sustainable human development.

None of the eight country teams produced both results: one addressed only the first objective while the other seven addressed only the second objective. The product of the first objective was intended to provide the basis for the selection of a research theme for the second by a national forum of all key stakeholders. In the absence of such a review, not only did the national forum not have a knowledge base for its deliberations, but the newly constituted multi-disciplinary national research teams themselves did not have a shared understanding of the social policy situation in their country and the knowledge available on it.

4. Program Development

When we turn to Phase II we find a proposal that fits clearly within the approach, general objective and specific objectives of the ASPR. The rationale for Phase II is still derived from the sustainable human development framework, but this rationale is not translated into the objectives of the programme. In stead these are derived from the structural adjustment programmes in the region and their impacts on the social dimensions of the societies, partly through the social policy reforms that they necessitated. We are told that the social policy reforms in the region are policy measures that tend to reduce the role of the state in the delivery of social services, to increase the participation of people in the planning and management of these services through decentralization, privatization and service fees. The justification of the regional programme focusing on the evaluation of social policy reforms is articulated in terms of the fact that the economic reforms - as well as their correctives in the social dimensions of structural adjustment - were implemented in all the countries involved. A regional evaluation would thus permit the achievement of economies of scale.

So the focus of the programme of Phase II is the evaluation of the decentralization of health services in four of the eight countries. This is seen as an evaluation of social policy reforms that will measure their success or failure in terms of the level of satisfaction of the basic health needs of disadvantaged groups and the degree of participation of people living in poverty and women in the decisions involved. The comparative research will identify the methods, instruments and indicators that performed best in terms of these two areas of impact.

The second element of the programme is a process of social experimentation with the methods, instruments and indicators for the conception, analysis and evaluation of the processes of decentralization of health services. There is no concrete notion of what is meant by social experimentation, what specific types of methods, tools or indicators might be involved and what "the processes of decentralization" would be in this context.

The appraisal noted that there were no ethical issues involved since the usual research ethics would be observed, but social experimentation raises more serious ethical issues that can only be assessed carefully when the actual experimental designs are known. Even though IDRC might not be involved directly in the funding of the social experimentation, it should protect itself from being associated with such practices.

5. Quality

A regional seminar on the research methodology of Phase II in Saly Portudal, Senegal, in October 1998, was to agree on a common research problematique and methodology to pursue the objectives of the programme approved by the IDRC. The seminar succeeded only in formulating three research questions along with a general hypothesis and four specific hypotheses for the research programme, as there was not time enough to agree on the key research variables, their indicators or measurements and the methods of research. There are two concerns about this approach: the notion of starting with hypotheses in this type of evaluation research and secondly, the nature of these hypotheses.

The formulation of hypotheses for an evaluation exercise like this appears rather artificial, especially since the research topic and objectives do not lend themselves to exact formulation and rigorous testing under controlled conditions. It is not common for evaluation research to start with hypotheses that basically predict what the findings of the evaluation will be. It is indeed surprising that the policy makers and government officials involved would be comfortable with such an approach.

The nature of the hypotheses chosen sharpens the unease with this approach. The general hypothesis is that "there are important gaps between the tenor of official policies and statements on the decentralization of health services and the actual policies that are implemented." There are several problems with this hypothesis. The first is that it is trivial: It is probably safe to assume that there is not a single country, north or south, where this hypothesis can be disproved: There are always everywhere important gaps between official announcements and actual implementation. If it were not the operating assumption of all evaluation research, there would be no need or justification for such research. The issue is rather: What are the gaps, what causes them and how can they be closed. The hypothesis also deflects scrutiny away from the official policies themselves to determine whether they are sound and coherent with regard to the health or social values sought.

The specific hypotheses are of the same nature, predicting findings of the evaluation and therefore casting doubt on its objectivity and credibility. In social science research one often finds what one sets out to find especially if there are no rigorous controls and exact measurements. For example, the first hypothesis maintains that among the resources allocated to the decentralization of health services, the availability of human resources both in quantity and quality is the factor most determinant of the success of the application of the processes of decentralization of health services. How is the relative strength of this factor going to be tested in comparison with the allocation of adequate financial resources, adequate devolution of decision-making powers, or effective

participatory implementation arrangements? The second hypothesis dealing with the divergence between the practical needs and the strategic interests of the actors, as well as the third on the modes and mechanisms of community participation in the management and control of decentralized health services suffer from the same inherent flaws.

The fourth hypothesis presents perhaps the most serious concern: "The decentralization of health services has not improved equity in access to these services." This must be the best known fact everywhere about the decentralization of health services as part of the so-called health reform movement. The evaluation issues are rather: Why is this so? What factors contribute to the failure of this strategy? Are there any conditions under which decentralization improved equity of access? Are there best practices? What lessons can be learned from the experience of these countries? How can pressure be brought to bear on policy makers to take the available evidence seriously and reform their reforms? The proposal to experiment with the best methods, tools and indicators found, suggest that the research has these types of questions in mind, but they are obscured by the formulation of these trivial hypotheses and are not built into the research designs.

In summary, the level at which these "hypotheses" are formulated trivializes the entire program and casts serious doubt on the validity of the findings and conclusions and their potential usefulness.

6. Reach and responsiveness to LDC priorities

These observations underscore the high-risk nature of the approach and strategy of the ASPR. This risk is further compounded by the decision of the network to develop a common approach and to research the same subject in Phase II, following the guideline of the ASPR. In Phase I research topics were selected at national fora to ensure relevance to the knowledge needs of a wide spectrum of stakeholders, albeit without adequate review of the state of the art in both social policies and research. The national effort would have been strengthened and national relevance enhanced if national fora reviewed the findings of Phase I and recommended on the national priorities for Phase II. In stead Phase II design was determined entirely at the regional level with only the limited participation of some members of the national teams and this was done prior to the presentation of the findings the first phase to the national stakeholders. The single specific theme for Phase II was chosen more on the basis of the strategic interests of the SPN/WCA as a regional network of researchers than on the practical needs of the countries, to use some of its own terminology. And Phase II was clearly designed to fit the ASPR framework and approach, in fact almost embarrassingly so. The reengineering of a weak, non-performing research network into a pretentious instrument of social policy reform assessment was a high risk venture of which the outcomes are highly unpredictable and must be seriously questioned on the basis of the evidence available. The latest annual report includes a risk analysis of programs in which the SPN/WCA is rated a high to medium risk. The reason that was offered for this rating is that of potential political instability at the national level in two of the four countries. It is seemingly unaware of the issues raised about the quality, relevance, reach and efficiency of the research program of the network and the considerable risks these represent.

The review of the four draft research proposals of the country teams (Cameroon, Congo, Mali and Senegal) supported in this phase do nothing to allay these fears:

The fact that none of these proposals contain a specific research design to test the hypotheses could be seen as a positive observation: if they tried, the program would have been in even more serious trouble. The Senegal proposal lists the hypotheses, but in spite of the encouragement by the regional coordinator, does not show how the research design relates to the hypotheses. In stead, it presents more specific versions of some objectives of the SPN/WCAII: a general objective and specific objectives that focus on research functions, factors, processes and outcomes with regard to the decentralization of health services. But the research methodology does not indicate how these objectives are going to be achieved. The Congo proposal does not mention the hypotheses, but focuses on the objectives of the network as applied to the Congo. The Mali proposal includes the hypotheses and repeats the Saly seminar report's suggestions on how the general hypothesis could be tested (the Mali team did not attend the seminar), but there is no research design that links hypotheses to variables to indicators to methods of data collection and analysis. The Cameroon proposal starts with three principal research questions, then lists 5 evaluation objectives and the four specific hypotheses suggested by the Saly seminar. Later on it proposes to evaluate the decentralization of 13 priority programs and states that data collection will include a list of "critical issues to be addressed by the evaluation of all levels" measuring the "extent of the applicability of the principles of" 18 areas that are almost without exception not operationalizable within the context of the proposed research.

In spite of the fact that the Saly seminar did not achieve its purpose to develop the necessary designs and instruments or at least some guiding principles for their development by the national teams, no follow-up work was done to compensate for this. In his report on June – December 1998, the regional director explained that a technical note that was planned was deferred in the light of the results of the seminar that formulated the hypotheses without identifying precise methods of data collection and analysis because of lack of time, but also because of an insufficient review of the literature on the subject of the research. He considered the few general guidelines provided in annex 4 of the report on the seminar as adequate. The reaction of ASPR project management to this report is not in the documentation received, but the report of the project team leader on the seminar indicated that the objectives of the seminar were achieved and that the national teams would elaborate the methodology as required.

These proposals were commented on in January and February 1999. All of them required extensive revisions suggested by the regional coordinator that included suggestions for greater methodological detail, but did not provide specific guidance. Neither the regional coordinator nor the ASPR manager raised these basic quality issues clearly or provided constructive guidance on how to improve the research designs. The suggested revisions included scaling down budgets that far exceeded the network's resources, in one case being eight times the funds available from IDRC. As of late June (15 months into the 20-month project) it is unclear at what stage the revision of these four proposals are. Thus

the Phase II strategy to reduce the risks of continuing to support a non-performing network by strengthening regional coordination and national institutional capacities and concentrating support on the four strongest countries does not seem to have made a difference in the performance of the network. But it neatly fits into the ASPR programming framework and objectives...

7. Conclusion

This case study of a sample activity highlights the inherent dangers in the PI approach and the way in which ASPR is implementing it. Even if this was the only case in which these outcomes were produced it would be one too many for comfort. It is recommended that this project be reviewed on an urgent basis based on on-site review of more current and more complete information than was available for this review.

ANNEX 2

**QUESTIONS RELEVANT TO THE EXTERNAL REVIEW OF
THE IDRC PROGRAM INITIATIVE ON
“ASSESSMENT OF SOCIAL POLICY REFORMS” (ASPR)**

These questions are directed at researchers in the partner institutions or networks and to key stakeholders, such as policy makers. **Please note that this is an external review of the ASPR, not specifically of your programme or project supported by the IDRC.** A few programs were selected as examples of the type of activities supported by the ASPR. Your program is not being evaluated as a program/project as such. There are two sets of questions, the first focussing on the ASPR and the second on programs supported by the ASPR, as an example of the type of activities that it supports.

A. IDRC’s Program Initiatives and the ASPR

1. Are you familiar with the IDRC Programme Initiatives approach within its Corporate Program Framework? What do you think of this approach? Does it provide a strong basis for responsive, relevant and high-impact research on development issues in your country/region?
2. Are you familiar with the Programme Initiative on “Assessment of Social Policy Reforms”, its 3 objectives and their Performance Targets? To which of these is your program oriented? Could you comment on how your program’s objectives and performance targets relate to those of the ASPR?
3. The ASPR has 5 Program Delivery Mechanisms. Are you familiar with these? Which ones apply to or are exemplified in your program? Are they appropriate for the type of work your institution promotes and the research you conduct? Have you found them relevant, helpful, facilitating and enabling? Are there aspects that inhibit, hinder or obstruct a sound approach to the type of research you believe you should be doing?
4. Could you comment on how each of these mechanisms (or only those of direct relevance) affects or affected your work?
5. What lessons have you learned in working with IDRC?
6. What comparative advantages does IDRC, as exemplified by the Program Initiatives, have with regard to the support of LDC development research over other comparable institutions?
7. What recommendations do you have with regard to the ASPR or the Program Initiatives to make these more useful and relevant to the knowledge and skills challenges in your country/region (or/and LDCs in general) in social policy reform and its assessment?

8. Where would you rate the ASPR on a scale of 1 to 5 (5 being high marks) with regard to the following:
- i. Being on the cutting-edge of development thinking
 - ii. Sensitivity to LDC priorities
 - iii. Appropriateness of modalities of support to LDC research
 - iv. Innovative approach to research and policy analysis
 - v. Empowerment of LDC researchers
 - vi. Relevance to LDC social policy issues and challenges
 - vii. Adaptability and flexibility in relation to LDC realities
 - viii. Efficiency and transparency
 - ix. Putting people at the centre of its concerns
 - x. Other
 - xi. (please specify as many as you like)
9. Are there any new approaches in the social sciences, social policy analysis and assessment, or development theory more generally, with which you are familiar and that you consider relevant to IDRC's ASPR that you would recommend that they explore or support?
10. In your opinion, does the Program Initiatives approach encourage and facilitate the exploration of such new approaches and alternative paradigms to the dominant ideologies of social policy reform?
11. Please make any other comments or present any other perspective or information that you consider relevant to and important in this review.
- B. Your own Program supported by IDRC: #50256/Monitoring and Evaluation of Poverty Alleviation Program (Peru)
1. How was this program initiated? What comments do you have on the process of defining and designing a program that meets the IDRC ASPR criteria and framework expectations? Was it responsive to your priorities? Does the final program as approved adequately reflect the research priorities and objectives of your institution?
 2. What do you see as the outputs that your program is expected to produce with IDRC support?
 3. Which of these have already been produced? How would you rate each of these outputs on a scale of 1 to 5 (5 being high marks) in terms of the following aspects:
 - i. Conformity with expectations and plans
 - ii. Timeliness of production
 - iii. Quality of the final product
 - iv. Appropriateness of the process to the product
 - v. Reception/assessment by main audience(s)
 - vi. Comparison with quality of outputs of other programs of your institution
 - vii. Comparison with quality of outputs of other research institutions in the region
 - viii. Reach in terms of involvement of many stakeholders
 - ix. Relevance to the objectives of the program (and the ASPR)

- x. Relevance to the social policy issues and challenges in the country or region
- xi. Impact or potential impact on main audience and stakeholders

Please produce a separate rating for each output, providing the following information on each: title, nature, date produced, size (e.g., number of pages, or length of workshop), volume (e.g., number of copies printed, or participants), distribution (e.g., number of copies sold or distributed), evidence of reception, use or application (e.g., number of reviews or quotations), availability on the Internet, number of web site hits.

4. In the light of the ratings you have just made, please add any comments you consider appropriate on the relevance of each output to the objectives of your program, the ASPR and the social policy issues and challenges in your country/region. For example, what concrete evidence is there that an output is having or will have an impact on the intended audience or stakeholders? Please be as specific as you can in terms of categories of stakeholders, influential individuals, policy makers or researchers or practitioners that have been exposed to and reacted to the output.
5. Please describe who are the principal partners and stakeholders in your program supported by IDRC, how you network with them and what the nature of their involvement is. Please categorize them as NGO, Research Institute, University, Canadian, etc., and provide numbers for each where possible, so that we have a concrete idea of the reach of your partnerships and networking with stakeholders.
6. Please add any comments you consider relevant to and important in this external review of the ASPR, whether or not related to your current program with the IDRC.

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