

**DEVELOPMENT AND TRAINING OF POLICY-MAKERS AND MANAGERS
IN THE SOCIAL SECTORS IN LATIN AMERICA**

(TC-95-02-29-7-RG)

EXECUTIVE SUMMARY

REQUESTER: Bank program

EXECUTING AGENCY: The Inter-American Institute for Social Development (INDES) of the Inter-American Development Bank

BENEFICIARIES: The borrowing member countries of the Bank

FINANCING: IDB: US\$6.7 million
(independent account, FSO)
Total: US\$6.7 million

TERMS: Execution period: 42 months
Disbursement period: 48 months

ENVIRONMENTAL CLASSIFICATION: The Environment Committee, at its meeting of June 27, 1995, classified this as a Category II operation.

OBJECTIVES: The proposed technical-cooperation project will answer a widespread demand from the countries in the region. It will help train a critical mass of senior and mid-level executives from the social sectors, NGOs, and other civil society organizations in the region in the design of social policies and in modern social management technologies, by financing their participation in courses and workshops offered by INDES. The project constitutes a comprehensive plan of training activities in support of social reform which INDES proposes to carry out throughout the region, drawing on a number of funding sources.

DESCRIPTION: The project will finance training in social policy and management for 1,240 executives from government, NGOs and other civil society organizations such as unions and the media, and for potential trainers from training institutions in the Bank's 26 borrowing member countries. It will be carried out over a period of 42 months through regional courses and workshops organized by INDES in Washington, D.C., and in the region.

The purpose of the training is to develop agents of change who can deploy efficient management approaches to support a process directed toward sustainable,

equitable social development in the countries of the region.

The project funds will finance travel, living expenses, and logistical support for the 1,240 expected participants. Given the heavy demand coming from the countries in this sphere, INDES proposes to train a further 2,840 social managers using other sources of funding.

This project does not include financing for education professionals to prepare or implement the training programs, since those tasks will be carried out by INDES staff, financed under the Bank's administrative budget, and by consultants hired with funds from that same budget and/or with contributions from other organizations interested in supporting the training initiatives.

**BENEFITS AND
RISKS:**

The project will facilitate the training of social managers and other agents from the public and private social sectors in the region, to better equip them to discharge their responsibilities as designers of social policy, managers of social programs and projects, and agents of change, thus contributing to the social reform process.

The aim of the project is to instill knowledge and provide the participants with new tools for the design and implementation of policies and projects. It also seeks to induce changes in the analytical structures used by participants so they can modify their approaches to policy analysis and potential alternatives for social reform. In addition, it will develop capacity for management, interagency coordination and network-building.

The greatest risk of the project is that the training will not have the anticipated impact. INDES hopes to minimize this risk through: (1) an effective and flexible participant selection system that will target executives having significant responsibilities in the social sector; (2) careful design of training activities; and (3) multiyear programming of training activities with institutions whose candidates are selected for the program.

**THE BANK'S
REGIONAL STRATEGY:**

The INDES initiatives have been designed to help achieve more efficient and equitable delivery of social services, and thereby to support a process pursuing sustainable, equitable social development in the countries of the region. These INDES activities, through the advanced training they will make

possible, will have a modernizing and multiplier effect in the social sectors. In so doing, INDES will help accomplish the tasks and goals stipulated by the IDB in its Eighth Replenishment document, which identifies poverty reduction and social reform as complex tasks that require, among other elements, fundamental improvements in the institutional capacity of the countries, particularly ones that can make for more efficient management of their social sectors.

RESPONSIBILITY IN INT/INDES with the collaboration of INT/RTC
THE BANK:

I. BACKGROUND

A. Frame of reference

- 1.1 There is considerable interest in Latin America and the Caribbean in carrying through sweeping social reform programs to tackle disparities in that crucial sector. Such social reform involves various components, including a close dovetailing of economic and social policies, the design and implementation of efficient, equitable and innovative social policies, thoroughgoing institutional modernization, development of managerial skills, and extensive social consensus-building in support of needed changes.
- 1.2 A revamped social policy will need to focus on creating opportunities for all members of society, and especially on reducing poverty. Government actions to that end should be designed and implemented with well-defined, transparent objectives so they can be judged by their results and impact. What is needed in particular is a new vision of social policies, in which they are seen as much more than a means of offsetting the effects of economic policies.
- 1.3 Processes of social policy development and implementation will also need to be more democratic. As democracy is instilled and strengthened in the region, the citizenry requires a say in decision-making processes and in the design, analysis and implementation of social programs. Such participation, when properly coordinated and managed, can become an instrument for making a country's policies more effective and sustainable.
- 1.4 In addition to the above factors, the achievement of sustainable social reform will necessitate the development of existing organizational and management capacity in order to institute social programs and projects. Weaknesses in these areas are a major bottleneck for social reform. It will be necessary to promote a sophisticated management culture, modernize institutions, overcome bureaucratic conflicts, encourage efficient interagency management for the implementation of social programs and projects, and introduce state-of-the-art management techniques throughout the social sector. In addition, initiatives should be proposed to establish networks between public sectors and other participants: the assisted communities, business, NGOs, community and professional associations, labor unions, the media, and political and other groups.
- 1.5 Skilled human resources are needed in order to achieve all of these objectives. Those in charge of implementing social policies must be equipped to function in circumstances that are complex and uncertain. Managers of social programs have to challenge formalist administrative traditions and promote a social management culture that focuses more on results and impacts and less on actions and

tasks, in which new models for participation and collaboration are applied.

- 1.6 The success and sustainability of social reform will depend fundamentally on improved designs for social policies, the articulation of these policies with economic policies and constraints, more democratic decision-making processes and the development of effective social management. A key problem in this area has been the lack of personnel trained in designing social policies and in social management, who are knowledgeable about diverse experiences in social reform, have modern managerial skills, and are committed to genuine social reform. The Latin American and Caribbean countries have repeatedly underscored the fact that the very small numbers of personnel trained in these disciplines is an obstacle to true social change. There is a growing demand for training and development in order to support social reform initiatives.
- 1.7 The strongest demands for training and development in the region fall into the following areas: conduct of social policy design and development processes; monitoring and evaluation of policies and programs, and devising of appropriate indicators; techniques for developing social projects; macrostructural redesign of the public social sector; creation of networks between social institutions; effective and strategic management of social programs; building of national accords on social objectives; and a shift from social assistance policies and projects with limited ends to strategies for mobilizing capacity within the beneficiary communities and in civil society organizations.

B. Inter-American Institute for Social Development

- 1.8 INDES was created to provide support for necessary changes and help countries develop their own capabilities to come up with solutions to the demands made on them. Its objective is to act as a catalyst for change and a builder of institutional capacity. Its basic functions include serving as a forum for sharing high-level expertise, a "technology bridge" for transferring forefront technologies to the processes of social reform, a framework for training public and private-sector social decision-makers, and a producer of useful training materials. In essence it is a multiplier and building institution, which is intended to be a focal point and catalyst for national and subregional processes of capacity development for social reform. It is hoped that the countries will make increasingly systematic efforts to offer training in these fields, and that the contribution of INDES will supplement those efforts.
- 1.9 INDES initiatives have been designed to help achieve more efficient and equitable delivery of social services, and thereby to support a process in pursuit of sustainable, equitable social development in the countries of the region. In this way, INDES will help accomplish the tasks and goals stipulated by the IDB in its Eighth Replenishment document, which identifies poverty reduction and

social reform as complex tasks that require, among other elements, improvements in the institutional capacity of the countries, particularly ones that can make for more efficient management of their social sectors.

1.10 The general activities of INDES are as follows:

- Regional and subregional courses and workshops for training in the development of social policies and social management, for senior executives from the public social sectors and NGOs, and for officials in economic areas that are related to social policies and projects.
- Serving as an ongoing forum for discussion among stakeholders concerning the institutional, organizational and management aspects of social reform.
- National programs for in-country training of social policy-makers and social managers having major responsibilities in social reform processes and in the decentralization of social management.
- Identification of key institutions for social reform and multiyear training of their staffs.
- Training of human resources to head up institutions that build capacity for social reform.
- "Train the trainer" programs to strengthen national training institutions.
- Programs for key sectors of society (business, lawmakers, communities, professionals, labor, the media) that can actively contribute to social reform.
- Programs aimed at supporting the work of the regions, departments and Country Offices of the IDB, through training in advanced areas of social policy-making and social management.
- Programs for training key personnel in other international organizations and agencies that work in the area of social reform.
- Ongoing production of materials useful for training and development.
- Creation of simulation models and games and case studies for social policy design and social management.

The aforementioned activities are intended in some cases to have direct impact, such as the transfer of modern technologies to social managers. In other instances, they seek longer-term

results, such as training directors of training institutions and training trainers, which are programs aimed at building national institutional capacities in this area.

- 1.11 It is anticipated that governmental, regional, subregional, non-regional and international organizations will participate in and cofinance most INDES activities.
- 1.12 A large proportion of INDES training activities is to be conducted in the countries of the region.
- 1.13 To carry out the proposed work plan, INDES will supplement the work of its teaching team with specialized consultants. INDES also plans to draw upon the expertise of IDB technical staff in its instructional work.

II. OBJECTIVES

- 2.1 The proposed technical-cooperation project will facilitate the achievement of targets for direct training of a critical mass of policy executives and managers from the social sectors, NGOs, and other civil society organizations in the region, in the design of social policies and in modern technologies for social management, by financing their participation in courses and workshops offered by INDES.
- 2.2 Through the aforementioned courses and workshops, the project will help train agents of change for social reform, strengthen the management culture in the social sectors, provide participants with modern management tools, assist with the design of indicators, and help set up in the social sectors a network of modern operators who can speak a common technical language.
- 2.3 The project includes a comprehensive plan of training activities in support of social reform which INDES plans to carry out throughout the region, drawing on a number of funding sources.

III. DESCRIPTION OF THE PROJECT

A. Activities

- 3.1 The project will finance the participation of 1,240 social policy-makers and managers from government, NGOs and other civil society organizations, and of potential trainers from advanced training institutions in the Bank's 26 borrowing member countries. It will be carried out over 42 months through regional courses and workshops to be organized by INDES in Washington, D.C., and in the

region. It should be noted that this regional technical-cooperation project will cover only the activities programmed therein, which are only a part of the activities envisaged in the overall INDES program (see schedule in Annex I) which will encompass an estimated 4,080 participants in all over that period.

- 3.2 The resources of this regional technical-cooperation project will finance travel, living expenses and logistical support for the 1,240 expected participants, broken down as follows:

Number of participants financed by the project					
	1995	1996	1997	1998	Total
# participants in 4-week regional courses	40	120	240	280	680
# participants in 6-week regional courses	-	40	40	40	120
# participants in 1-week regional workshops	20	100	120	200	440
Total participants financed by the project	60	260	400	520	1,240

- 3.3 This is a tentative plan, which will be adjusted according to demand and to the funding obtained for participants from other sources. However, any change will mean shifting the funds to other courses, without altering their end use.

- 3.4 Drawing on its own administrative budget, INDES will finance the work of education professionals to prepare and deliver the training programs, and of consultants hired with funds from that same budget and/or with contributions from other organizations interested in supporting the training initiatives. In other words, the Bank's administrative budget and contributions from other donors will fund the initial expenditure for research and development (curriculum design, development of course content and teaching materials) and implementation of the Institute's activities.

B. Objectives and features of regional courses and workshops

- 3.5 The goal of the INDES regional courses and workshops for social managers - i.e., senior officials and managers discharging high-level responsibilities in the social sectors - and strategic social agents is to offer participants the following:

- a. a greater awareness of and commitment to the need for social reform;

- b. a better understanding of the close relationship between economic and social reforms;
 - c. a command of tools that can expedite the formulation of social policies which answer true social needs;
 - d. concepts and techniques for effective management of social policies and programs; and
 - e. opportunities for systematic sharing of experience with social managers from throughout the region.
- 3.6 The regional courses will have 40 participants and will consist of three phases: an initial remote preparatory phase to introduce participants to key topics of the course through a set number of selected readings and tutorial work; a second on-site phase comprising the intensive formal course, focused on learning, sharing of ideas and discussion; and a third phase for establishing and maintaining an electronic discussion and refresher network, through which the following information will circulate via INDES: documents that expand on the topics presented in the on-site phase, useful technical documents related to the participants' areas of responsibility, innovative ventures in their area of work, information on participants' activities and experiences of interest, and information on IDB activities in their fields.
- 3.7 In the on-site training phase, participants will have an opportunity to apply what they have learned and discussed by designing a project applicable to their own institutional experience, conducting simulations of decision-making processes regarding social policies and the management of social programs, and presenting and discussing case studies.
- 3.8 The train-the-trainer course will last six weeks. It is intended to train administrators and teachers from recognized advanced training institutions to design and run national programs for training in the design of social policies and social management.
- 3.9 The workshops will run for five days and will have 20 participants. They are targeted mainly to senior social policy-makers and managers and will focus on strategic issues for policy design and decision-making by these executives in their specific areas of responsibility.

C. Participants

- 3.10 The participants in the regional courses and workshops will be: (a) executives from public agencies that design and participate in social policy-making; (b) executives from public agencies that design and participate in economic policy-making and allocation of resources to the social sectors; (c) social managers from public agencies responsible for implementing social programs and projects;

(d) managers responsible for implementing large-scale social programs and projects sponsored or implemented by NGOs; (e) leaders of other civil society organizations that promote or take part in the implementation of social programs and projects, including employers, labor and professional associations, religious communities, journalists, community organizations, etc.; (f) trainers and instructors from institutions that undertake to design and carry out training events or training programs in national or subregional entities, in order to create a multiplier effect through the dissemination of the Institute's training at the state, provincial, municipal and local levels; and (g) technical staff of the Bank's regional departments and Country Offices who work in social sector operations.

- 3.11 When a government nominates a candidate for a regional course and the candidate is accepted, the ministry having authority over the agency in which the official is employed will sign an agreement with the IDB guaranteeing that, barring any serious dereliction of professional duties on the official's part, he or she will remain in the employ of the public sector as a social policy or program executive for at least one year after the completion of training. For their part, officials accepted into the course will undertake not to leave the position they held when they were accepted, other than to accept a promotion as a social-sector executive, until the end of one year after completion of their training.
- 3.12 Candidates for INDES regional courses and workshops for social managers will be selected on the basis of the following general principles, to be specified in each course announcement:
- a. They must be involved in institutions or programs of importance to social reform in their countries.
 - b. In those institutions or programs they must have substantial responsibility for designing social policies or managing large-scale social programs.
 - c. They must have been evaluated by their organizations as having strong potential for development, proven leadership skills, and an innovative approach.

D. Selection of participants

- 3.13 The selection process for participants will consist of three phases: (a) publicity and invitations to appropriate entities to nominate candidates for the course; (b) receipt of applications by the Bank's Country Offices and forwarding to INDES; and (c) final selection. During the first phase, INDES will publish information on the course and associated financing, and will circulate it to institutions involved with social policy development and implementation in the region. INDES will also extend invitations to entities that play leading roles in the development or implementation

of social policy to nominate candidates for the courses. Each candidate must be nominated by an organization and must complete an application with the required information.

- 3.14 INDES will ask the Bank's regional departments for assistance in identifying prospective candidates.
- 3.15 Final selection of candidates will be handled by an interdepartmental selection committee that will meet at Bank headquarters to assess each application on the basis of the following general principles, to be specified in each program:
 - a. areas of responsibility of the candidate;
 - b. academic and professional excellence;
 - c. the extent to which the candidate's work serves the neediest population groups; and
 - d. relevance of the anticipated course or workshop content to the tasks and functions regularly performed, or to be performed in future, by the candidate.
- 3.16 The committee will select the participants for each course. In doing so, it will seek fair representation in each course of the sectors in which the participants work, the types of organizations they represent and their countries of origin. At least 10% of the participants will be professionals working with nongovernmental organizations.

IV. EXECUTION

A. Project administration

- 4.1 The courses and workshops described in this document will be designed and conducted by INDES, under the direction of the Manager of the Integration and Regional Programs Department (Director of INDES). The Coordinator of INDES will be the project team leader.
- 4.2 The Bank's offices in the member countries will assist INDES with publicity and the receipt of applications.
- 4.3 The courses and workshops to be organized with the proposed technical-cooperation funding require personnel for logistical support, to assist participants during the courses in areas such as computer services, teaching materials, hospitality, and library services. The Bank will hire such personnel directly, for purposes of this technical-cooperation project only (details in Annex IV).

- 4.4 The interdepartmental selection committee referred to in paragraph 3.15 of this document will be composed of the Manager of the Integration and Regional Programs Department, the managers (or their appointees) of the regional departments and of SDS and DPP, and the Coordinator of INDES.
- B. Implementation period
- 4.5 The program will be carried out over 42 months starting from the approval of the plan of operations.
- C. Follow-up and reports
- 4.6 The Bank, through INDES, will evaluate the performance of all participants in the courses and workshops. It will also assess the courses and workshops by conducting evaluation and feedback exercises with participants during the training period and at the end of the on-site portion of the course or workshop. These exercises will include evaluation of objectives, content, methodology and instructor performance.
- 4.7 The INDES courses have been designed with a view to forging lasting ties between INDES, the participants and the institutions sponsoring them. After a course or workshop ends, a permanent discussion network will be set up with the participants, to turn the course or workshop into a focal point for an ongoing refresher system for those who have taken part in these training events. A key component of this information-sharing strategy will be the creation of an INDES bulletin board on the Internet, in order to keep participants informed of INDES products and publications, and facilitate an ongoing dialogue between INDES, other units of the Bank and the participants.
- 4.8 INDES will conduct a follow-up of participants through their supervisors, by means of a written survey six months after the end of a training event. The survey will provide INDES with an "assimilated response" from the trainees, to show how applicable the training was to actual conditions in each participant's country. This will provide feedback on the contents and teaching methods of the Institute and contribute to the ongoing discussion with participants. The assessment carried out with the participants' supervisors will make it possible to ascertain what changes are evident on the job after an official has taken part in the training, and what the institution has gained.
- 4.9 INDES has devised a set of indicators to help it monitor the promotion of its activities, candidate selection, reaction to courses, the immediate impact of training, and the financing of the Institute's activities (see Annex II). The minimum expected values for each indicator for the term of this technical cooperation are indicated in that annex.

- 4.10 The evaluation of results and impacts of INDES training will also be based on a careful analysis of comments and suggestions received from participants and their supervisors. Qualitative impressions and reactions will be compiled systematically in order to determine the nature of the results and impact produced, the obstacles to achieving greater impact, the course elements that are most conducive to producing impact and the discussion and teaching methods that have proved most effective.

D. Project costs and financing

- 4.11 The resources of the regional technical-cooperation project will defray the following costs for all participants in the regional courses and workshops: round-trip air fare from their place of work to the site of the course or workshop; accommodation, to be paid by INDES and concentrated at a single site so as to encourage interaction and collaboration among the participants and to secure better prices and lower costs; a modest stipend for meals, transportation, communications and miscellaneous expenses during the course or workshop; medical and life insurance for the time participants will be absent from their country of origin to attend the Institute's course or workshop; and course or workshop materials and texts. The cost of personnel providing logistical support to participants will also be covered, including personal, computer and library assistance. As an exception, and given the nature of the program, one priority of which is to broaden the cultural exposure of participants, a small budget is being included for that sole purpose, to defray the cost of transportation, guides, cultural activities, and meals during those activities.
- 4.12 Charges against the project will be authorized retroactively to August 15, 1995, if the operation is approved after that date.
- 4.13 The total cost of the project is US\$6.7 million, which would be financed by the Bank on a nonreimbursable basis from the independent account of the Fund for Special Operations, according to the following budget:

Expenditure item		Total
3.3.1.1	Participants' travel	1,612,000
3.3.1.3	Stipends	3,710,040
3.4	Insurance	95,200
3.5	Teaching materials	182,000
3.9	Other	154,800
6.6	Support personnel	354,900
9.8	Contingencies	591,060
TOTAL		6,700,000

A more detailed budget is appended as Annex IV.

V. BENEFITS AND RISKS

A. Benefits

- 5.1 The project will facilitate the training of public- and private-sector social managers in the region to discharge their responsibilities as designers of social policy and directors of social programs and projects, thereby contributing to the social reform process.
- 5.2 In addition to the training they make available, INDES regional courses and workshops will offer valuable opportunities for sharing of ideas and debate, thus giving each participant an understanding of experiences and lessons to be drawn from the social sectors of a number of countries of the region and the world. These events will also promote a spirit of integration and solidarity in the pursuit of social development, which could help instill a firm commitment to social reform.
- 5.3 The regional courses and workshops also offer an excellent opportunity to establish networks of professionals that can stimulate future discussion and sharing of ideas and thereby give participants new resources and inputs for analysis of their national or subnational problem areas. They will also facilitate the creation of networks between participants and the Bank.
- 5.4 The INDES training is aimed at instilling knowledge and providing participants with new tools to use in the design and implementation of policies and projects. It also seeks to induce changes in the analytical structures used by the participants so they can modify

their focus for policy analysis and possible alternatives for social reform. In addition, it will build capacity for management, interagency coordination and networking.

- 5.5 As a result of their focus on institution-strengthening, the INDES courses and workshops will make a key contribution to institutions engaged in social reform, by helping to develop their executive staff.
- 5.6 The training provided in the INDES regional courses and workshops will indirectly benefit the Bank's lending and other operations by training a number of professionals who will be counterparts and implementers of Bank programs in progress and in the pipeline.

B. Risks

- 5.7 Risks in training of this nature are typically associated with the possibility that the impact of the training will be diluted across the vast social sectors in the countries benefitted.
- 5.8 INDES will attempt to avert this risk by strategic selection of participants for regional courses and workshops, seeking professionals who are carrying out genuinely important roles in the design of social policy and social management in their countries. The significance and relevance of the candidates' responsibilities will be analyzed and rigorously during the selection process.
- 5.9 Second, INDES will minimize this risk by carefully designing the content of training so that it will have a strong action training focus. All participants should come out of a course or workshop with concrete added value in terms of knowledge that will help them tackle the central problems of their particular milieu. The content will be adapted to the priority demands emanating from the strategic agenda of the region's social decision-makers and managers.
- 5.10 Third, through multiyear programs, INDES will place strong emphasis on the training of teams within institutions that carry out joint policies or programs in order to produce a stronger impact.
- 5.11 The content of INDES courses and workshops will include elements designed to promote changes in the organizational behavior of the participants and motivate them to be agents and promoters of social reform.
- 5.12 INDES will enter into agreements with the institutions that nominate participants, setting out their commitment to support their officials' subsequent work at those institutions and their participation in a development and discussion network. INDES will provide support for fulfillment of these commitments by setting up an active network for discussion and updating for participants, INDES staff, Bank personnel and other stakeholders in the region. For

their part, the participants will pledge to continue in their duties.

- 5.13 In addition, some of the courses envisioned are "train the trainer" endeavors, in which the multiplier effect could be considerable.

VI. EVALUATION

- 6.1 The evaluation of the results and impact of this project will be based on the evaluation of each course or workshop, assessment of participants' performance, the participant follow-up described in paragraph 4.6, and the evaluation performed by supervisors at the participants' home institutions. A self-evaluation by the INDES staff and instructors that took part in the courses and workshops could be a further input into the evaluation process.
- 6.2 INDES will be responsible for the design and administration of the evaluation and monitoring tools.
- 6.3 A formal mid-term evaluation will be conducted prior to the end of the second year of project execution. The interdepartmental selection committee for the project will take part in that exercise.

TABLE 1

SCHEDULE OF INDES TRAINING AND DEVELOPMENT PROGRAMS, 1995-1998
TO BE COVERED BY THE PROPOSED TECHNICAL-COOPERATION OPERATION

Type of activity	1995		1996		1997		1998		Total	
	No. prog.	No. partic.	No. prog.	No. partic.	No. prog.	No. partic.	No. prog.	No. partic.	No. prog.	No. partic.
Regional courses for social managers (four weeks)	1	40	3	120	6	240	7	280	17	680
Regional train-the-trainer courses (six weeks)			1	40	1	40	1	40	3	120
Regional workshops (one week)	1	20	5	100	6	120	10	200	22	440
ANNUAL TOTAL	2	60	9	260	13	400	18	520	42	1,240

TABLE 2

SCHEDULE OF INDES TRAINING AND DEVELOPMENT PROGRAMS, 1995-1998
 TO BE FUNDED FROM SOURCES OTHER THAN THE PROPOSED TECHNICAL-COOPERATION OPERATION

	1995		1996		1997		1998		Total	
Type of activity	No. prog.	No. partic.	No. prog.	No. partic.	No. prog.	No. partic.	No. prog.	No. partic.	No. prog.	No. partic.
National programs for social policy-makers and managers			8	320	12	480	15	600	35	1,400
Programs for administrators of training institutions			2	60	3	90	3	90	8	240
Programs for key stakeholders	2	60	6	180	7	210	9	270	24	720
Programs for direct support to regions and IDB Country Offices			2	60	2	60	2	60	6	180
Programs for other international organizations	1	30	3	90	3	90	3	90	10	300
ANNUAL TOTAL	3	90	21	710	27	930	32	1,110	83	2,840

**INDICATORS FOR MONITORING AND EVALUATION OF INDES ACTIVITIES
COVERED BY THE PROPOSED TECHNICAL-COOPERATION OPERATION**

Indicator	Source of information	Purpose	Estimated targets*
A. Candidates**			
Number of candidates and number of participants - total - by country - by group of countries - by type of organization - by sex	Data base, INDES applications	To evaluate profile of applications received by INDES, to ascertain any weaknesses in processes of promotion, publicity, and sending of invitations. To identify cases in which no interest is generated in nominating candidates, in order to take corrective measures.	Double the number of training slots available
B. Participants			
% of participants who are: - public officials - NGO officials - trainers - from C and D countries - women - from the social sectors - from the "economic" sectors	Data base, participants, INDES	To verify that participants meet the profile of INDES's target population and that different groups of that population are adequately represented.	50 10 10 30 30 50 10
% of participants receiving an "excellent" or "good" performance rating in the course	Participant performance evaluations, INDES	To ensure that participants are achieving effective performance in the courses.	85
C. Projects developed			
% of participants who develop a viable and applicable reform project during the course	Data base, projects, INDES	To measure relevant work and projects generated during INDES courses.	75
D. Response to the course			
Average overall response to the course (scale: 1-10; highest score: 10)	Evaluation by participants at end of course	To measure degree of participant satisfaction with the course.	8
% of participants who say they emerged from the course with concrete tools to enable them to effect changes in the initiatives on which they are working	Evaluation by participants at end of course	To gauge the potential for impact generation.	90
% of participants who say the course will help strengthen the decision-making process in their country's social sector	Evaluation by participants at end of course	To gauge the potential for impact generation.	85
% of participants who feel the course met the proposed objectives	Evaluation by participants at end of course	To gauge the degree of participant satisfaction with the course.	80

Indicator	Source of information	Purpose	Estimated targets*
E. Course impact			
% of participants who, six months after the end of the course, have applied tools or knowledge gained during the course	Follow-up survey of participants six months after end of course	To ascertain the short-term impact of the course.	75
% of participants who, six months after the end of the course, feel the course has changed the way they work	Follow-up survey of participants six months after end of course	To ascertain the short-term impact of the course.	70
% of participants who, six months after the end of the course, cite an example of a change in policy or processes that was influenced by the course	Follow-up survey of participants six months after end of course	To ascertain the short-term impact of the course.	40
% of institutions which, six months after the end of the course, think it improved participants' performance	Follow-up survey of supervisors six months after end of course	To ascertain the short-term impact of the course.	70
F. Overall INDES training course financing			
% of participants whose costs (travel, living expenses, insurance) will be covered by non-IDB sources		To measure the diversification of funding sources for participation of professionals in INDES courses, promoting reduced dependency on Bank resources for that purpose.	66
% of sessions conducted by instructors funded with non-IDB resources		To measure the diversification of sources of funding for INDES training.	66

* Minimum anticipated targets for each indicator for the 1995-1998 period.

** Does not apply to the first course, for which candidates will be preidentified.

INTER-AMERICAN DEVELOPMENT BANK
INTER-AMERICAN INSTITUTE FOR SOCIAL DEVELOPMENT

PROGRAM OF MANAGERIAL DEVELOPMENT
IN SOCIAL POLICIES AND MANAGEMENT

EXECUTIVE SUMMARY

I. OBJECTIVES

Directed principally toward senior-level public managers in the area of social policy in Latin America and the Caribbean, the program's primary objectives are to contribute to:

- the application of conceptual models and recent technology in the social sector;
- greater articulation between economic and social policies;
- improvement in the processes of formation and design of social policies;
- the modernization of the managerial culture among organizations involved in social policy;
- progress in establishing a unified, structured, and consistent vision of the problems facing social managers, as well as alternatives for addressing those problems;
- the consolidation of a unified conceptual and technical language.

II. BASIC CURRICULAR ORIENTATION

The program has been prepared based on a systematic analysis of international experience in the design of social policies as well as the management of social programs. It was designed after careful study not only of other major training programs in related fields but also of characteristics that are unique to Latin America.

The central themes that drive the program include:

- a. The idea that the topic of social policy cannot be resolved exclusively through methodological improvements in the policy design process. It needs to be reexamined from the point of view that events themselves produce a policy formation process in which numerous actors intervene and push in different directions. This means that an effective policymaking process must take these components into account, including appropriate strategies for working under these conditions.
- b. On the other hand, it is held that there is a high degree of specificity in the field of social management, and that the type of problems facing those who carry out massive social programs tend to be markedly different from the problems characteristic of other areas of management. These features include: the need to articulate permanently that which is economic and that which is social; the fact that numerous institutions intervene in social programs, giving rise to complex problems of interinstitutional management; the need for transparency and effective social control over programs; the difficulties created by desirable processes of decentralization among social programs; the orientation toward creating conditions that

encourage effective participation among the beneficiary communities. These and other elements require a particular sort of management, one that is different from those which are applicable in other fields such as the traditional public sector or the private sector. There is a certain specificity to social management.

- c. The program strictly involves applied learning. It is geared toward providing managerial participants with analytical frameworks and technical instruments that can help improve their daily tasks.

III. PARTICIPANTS

The INDES program on social management and the design of social policies is intended for public-sector directors working in two basic areas:

- those who have significant responsibilities in the decision-making process of social policy;
- those on the front lines, who are executing massive social programs; or from organizations which are implementing social programs.

A Selection Committee will choose participants based on available quotas.

This first course will be held entirely in Spanish.

IV. CURRICULAR STRUCTURE

The program will be developed in two phases:

Introductory phase

Once accepted, the participant will begin a job of long-distance study. He or she will be sent a set of technical documents to be read in his or her country of residence.

Training phase

This will take place at the INDES headquarters in Washington, D.C., from September 11 to October 6, 1995.

It will consist of the following successive stages of training:

- Part 1. Frameworks.

Objectives: To analyze the social, economic, and political environment in Latin America which shapes the task of designers and managers. To offer frames of reference on microeconomics and reform of the state. To discuss fundamentals of social reform. To present the contents to be touched upon in the program's two sections.

- Part 2. Design and Management.

The course will be divided into two sections. Those involved in the policymaking process will participate in the policy design section, and those involved in managing massive social programs (whether directly or through other institutions) will take part in the social management section.

The section entitled "The Design of Social Policies" will analyze themes of social measurement, needs, efficiency and equity, fiscal policy, integration of economic and social policies, health and education policy, financing, decentralization and participation, social investment funds, targeting, management for designers, intergovernmental management, and negotiation.

The section entitled "Social Management" will focus on the specificity of social management, analysis of the environment, large-scale social sector organization, strategic planning, project planning, negotiation, decisionmaking, personnel, budget, intergovernmental management, networks, decentralization, municipalization, and participation.

Both sections will have certain topics in common.

- Part 3. Evaluation, Simulation, and Integration.

The entire course will focus on monitoring and evaluation techniques for social programs, including a simulation exercise in which part of the acquired knowledge will be applied. Finally, an effort will be made to forge an group integration of the acquired knowledge.

In addition to the three previous stages, each participant will work from the beginning of the course on preparing a "Social Project." This will consist of formulating and designing a project that is applicable to problems which are relevant to the organization in which the participant works. The teaching team will offer the participant training in the formulation of the design, and the participant will present the final results during the last week of the course.

V. ELECTRONIC NETWORK

A third phase is planned for the establishment and maintenance of an electronic network for exchanging and updating information. Through this network, the INDES will provide: supporting documents on the various themes presented during the course, technical documents relevant to the participants' areas of responsibility, innovative experiences in their area of work, information on the activities of the participants, interesting experiences they have had, and information regarding the Bank's activities in their field.

PROPOSED RESOLUTION

REGIONAL. NONREIMBURSABLE TECHNICAL COOPERATION FOR THE TRAINING
OF POLICY MAKERS AND MANAGERS FOR THE SOCIAL SECTORS
IN LATIN AMERICA PROGRAM

The Board of Executive Directors

RESOLVES:

1. That the President of the Inter-American Development Bank, or such representative as he shall designate, is authorized, in the name and on behalf of the Bank, to take such additional measures as may be pertinent for the execution of the plan of operations referred to in Document AT- with respect to a nonreimbursable technical cooperation for the Training of Policy Makers and Managers for the Social Sectors in Latin America program.

2. That up to the sum of US\$6,700,000, is authorized for the purpose of this resolution, chargeable to the independent account of the Fund for Special Operations.

3. That the above-mentioned sum is to be provided on a nonreimbursable basis.