

# South Evaluation of the RORG-network in Norway

- a View from the South on  
Development Education in the North



A report prepared by  
Dr. Stiaan van der Merwe,  
VDM Consultancy, Johannesburg, South Africa 2003

Publisher: The RORG-network  
Storgt. 11, 0155 Oslo  
Norway  
+47 23 01 03 20  
+47 23 01 03 01  
e-mail: [rorg@rorg.no](mailto:rorg@rorg.no)  
web: <http://www.rorg.no>

Coverphoto: Kirsti Svenning - The Norwegian Forum for Environment  
and Development (FORUM)  
*"Our World is not for sale"*  
(NGOs rallying during The World Summit on  
Sustainable Development WSSD,  
Johannesburg, South-Africa 2002)

Layout: Sidsel E. Aas

First print edition September 2003

# TABLE OF CONTENTS

FACT SHEET	5
SUMMARY	6
LIST OF ABBREVIATIONS	9
PART 1: INTRODUCTION	10
PART 2: BACKGROUND	13
- 2.1 DE in 'the north'	13
- 2.2 DE in Norway	15
- 2.3 The RORG-Network	18
- 2.4 The background and rationale for a 'South evaluation'	19
PART 3: MAIN FINDINGS	21
- 3.1 General strategic issues	21
- 3.1.1 Capacity	22
- 3.1.2 Substance, vision and mission	22
- 3.1.3 Setting of goals	25
- 3.1.4 Managing strategic issues	26
- 3.1.5 Performance appraisal and strategic management	26
- 3.2. Interaction with the South	26
- 3.2.1 Nature and extent of interaction with the South	26
- 3.2.2 Impact of interaction with the South on organisation and constituency or target groups	27
- 3.2.3 Stakeholder appraisal on messages regarding the South	28
- 3.2.4 On raising controversial/uncomfortable issues as per positions in the South	29
- 3.3 The Millennium Development Goals (MDGs)	29
- 3.2.3.1 The role of MDGs in DE work	29
- 3.2.3.2 Anticipated trends in views from the South	30
- 3.4 South input and perspectives on DE and the MDGs	30
- 3.4.1 Perspectives	30
- 3.4.2 Methodology	31
PART 4: OBSERVATIONS AND CONCLUSIONS	33
- 4.1 Evaluating the process and management	33
- 4.1.1 Developing mandates and terms of reference	33
- 4.1.2 Oversight and independence	33
- 4.1.3 Funding and finance	34
- 4.1.4 Preparation, orientation, participation and buy-in	34
- 4.1.5 Final position	36
- 4.2 Overall evaluation on the efficacy of the RORGs	36
- 4.3 The usefulness of the MGDs for DE	37

PART 5: RECOMMENDATIONS 38

ANNEXES:

ANNEX 1: Terms of reference	40
ANNEX 2: List of institutions and persons consulted	44
ANNEX 3: Biographic details on the South Reference Group (SRG)	45
ANNEX 4: List of member organisations in the RORG-network	46
ANNEX 5: Questionnaire for the RORGs	47
ANNEX 6: Questionnaire for NGOs in the South	48
ANNEX 7: Process components and management	50
ANNEX 8: The Maastricht Global Education Declaration (Maastricht 2002)	52
ANNEX 9: Statement to Europe-wide Global Education Congress by Invitees from the South (Maastricht 2002)	55

REFERENCES:

- NOU 1995:5 Norsk sør-politikk for en verden i endring (Report of the government-appointed commission on aid- and north/south-issues, 1995)
- NORADs retningslinjer for informasjonsstøtte, 2001 (NORAD guidelines for funding of DE)
- Nygaard, Arnfinn: Development Education in Norway. The Development Education Journal, Vol. 8.3 June 2002, The Development Education Association, Trentham Books, London 2002
- Parliamentary Assembly of the Council of Europe, Resolution 1318 (2003), January 30th 2003

# FACT SHEET

The South evaluation of the RORG-network (a Norwegian NGO-network active in Development Education) was commissioned by the RORG-network itself in early 2002, following dialogue and agreement with Dr. Stiaan van der Merwe (VDM Consultancy, South Africa) as the project coordinator. Naty Bernardino (The Philippines) and Alejandro Bendaña (Nicaragua) has been assisting van der Merwe as members of the South Reference Group (see annex 2 for biographic details).

The main objective of the evaluation has been to engage the South in evaluation of Development Education (DE) in the North in general and in particular to have a South-evaluation of the DE work being carried out with financial support from NORAD by the member organisations of the RORG-network in Norway (RORGs). In addition the evaluation aimed at soliciting southern perspectives and input on how to engage with the United Nations Millennium Development Goals (MDGs) in future DE in the north.

The operation has included field trips to Norway, the use of questionnaires and interviews with RORGs as well as NGOs and networks in the South, in-depth interviews and strategic planning with individual RORGs and joint meetings with the RORGs as a network. The main parts of the operation took place from May - October 2002 and ended with a 2-day joint meeting in Oslo in February 2003.

Government funding for DE in Norway is among the highest per capita in OECD/DAC members states. Government spending on DE through NGOs in 2002 amounted to a total of more than NOK 50 million. Of the total sum NOK 17 million was granted to the RORGs, NOK 17,5 million to the Norwegian UN Association and NOK 10 million to the five larger Norwegian aid- and relief organisations.

The evaluation process was initiated with financial support from NORAD at NOK 250.000,-. This amount was extended with additional financial support from the Norwegian Ministry of Foreign Affairs (MFA) at NOK 267.650,- after meetings between the MFA, the project coordinator and the coordinator of the RORG-network at an early stage of the process.

Responsibility for the content and substance of the report rests with the project coordinator, but the format and language has been adjusted to the requirements of the MFA and the RORG-network.

# SUMMARY

## Background

This evaluation concerns the Development Education (DE) work being carried out by the member organisations of the RORG-network in Norway. The RORG-network is a network of organisations holding framework agreements with the Norwegian Agency for Development Cooperation (NORAD), that provides for funding of DE in Norway. In 2001 a decision was made by the RORG-network, being a development-related organisation in the North, to subject itself to an evaluation from 'the South' by means of a primary stakeholder evaluation.

The novelty of the approach, as well as the novelty of having to conduct a project of this nature in uncharted waters, applied their own pressures on the process. However, the process has opened up and even created new horizons of insight and knowledge in the field of DE. The process was not spared the fundamental tensions between North and South to the extent that the process could have derailed at any given point in time. This tension should be read as an underlying theme of both the process and content of the evaluation project.

Terminologically the following distinctions were developed:

- The terms *the North* and *the South* symbolically represent the global economic, political and moral divide between the global rich and powerful countries mostly in the northern hemisphere on the one hand and on the other the global poor and marginalised countries mostly in the southern hemisphere.
- Development Education (DE) in its most general and abstract meaning is used in this report as a technical term referring to a variety of educational processes and activities focussing on global developmental issues, and thereby also on North-South issues. These processes and activities could be both formal and informal, i.e. within and outside the formal educational system.

The decision to be evaluated from the South was motivated by the notion that the South is the primary stakeholder of DE in the North. Therefore, the South should be enabled to do this primary external stakeholder evaluation, rather than a northern, external evaluation. The historical backdrop in Norway for the decision to go this route has been a struggle in and around the RORG-network to be proactive in owning the DE agenda and to broaden and deepen the agenda towards greater efficacy of DE in Norway. This position has been aimed at countering the dominant approach by aid- and relief organisations whereby DE is seen as informing the public and donors on their own aid efforts often linked to fund-raising.

Three issues were requested for assessment:

- To assess the efficacy of DE in Norway as viewed from the South, as the major focus of the evaluation.
- To assess the usefulness of the United Nations Millennium Development Goals (MDGs) for DE, in the North in general and in Norway in particular, as viewed from the South.
- To provide practical suggestions and advice on fundamental strategic issues such as context analyses, vision, mission, substance, means and ways of doing DE in Norway.

## Methodology

The project coordinator, Dr. Stiaan van der Merwe (South Africa) worked with a South Reference Group

(SRG) consisting of Ms. Naty Bernardino (Philippines) and Prof. Alejandro Bendaña (Nicaragua). Mr. Arnfinn Nygaard (Coordinator of the RORG-network) was in assistance to this group as in ex officio capacity.

A two-pronged process was followed:

1) A process dealing with the RORG-network and its member organisations consisting of:

- Developing mandates and final agreement at the 2002 AGM (April 2002)
- Developing, sending out, and responding to a questionnaire (May 2002)
- Field work visits to organisations to discuss responses to the questionnaire.(June 2002)
- A meeting with the South members of the reference group to interact with representatives of RORGs on the responses to the questionnaire and to discuss first impressions and observations. (June / July 2002)
- A Work-in-Progress report was circulated for comment. (July 2002).
- A series of meetings with member organisations relating to strategic thinking and planning for DE, as requested during the meeting with South members of reference group as an attempt to create greater buy-in on issues raised and to ensure momentum for follow-up. (October / November 2002)
- A draft final report presented for comment to the RORG-network (December 2002)
- Joint seminar of RORGs to discuss the draft report in preparation of the final report. (February 2003)

2) A concurrent process to solicit as broad as possible inputs from the South, consisting of:

- Discussions on the viability and feasibility of questionnaire to role players in the South given the newness of the project and indications of resistance and suspicion as to the purpose of DE in the north and the purpose of the evaluation project. (May-June 2003)
- Workshop at the World Summit on Sustainable Development (WSSD) on DE in the North. (September 2003)
- Follow-up questionnaire to a range of role players from the South. (September to November 2003)
- Interaction by a group from the South at the Europe-wide Congress on Global Education, in Maastricht (November 2002).
- Attending the World Social Forum, Porto Alegre, Brazil (January 2003).

## **Observations and conclusions**

### ***Operational and strategic matters***

- A tremendous volume of energy and resources go into the DE work in Norway and massive amount of information is 'pumped out' and released to the public or certain target groups in a rich variety of ways. Sophisticated and extensive channels for communication have been established.
- There is limited capacity designed and allocated to DE in the respective RORGs, which appeared to reflect a limited understanding and priority of DE within the RORG-network as a whole and in the different organisations.
- There is a lack of clarity among the RORGs on the concept of DE and a fading organisational memory on the history of DE in Norway. The differences on the understanding of DE are functioning as a weakness in the RORG-network, reflecting diffusion and disagreement rather than complementarity.
- The lack of conceptual clarity raises questions on the efficacy of the DE work carried out by the RORGs.

- Serious deficiencies and challenges related to strategic thinking and strategic management led to a position whereby the overall efficacy of DE work by the RORGs has to be questioned, with particular reference to the overall benefits for the South. These include: fundamental critical contextual analysis and selfunderstanding, vision, mission, overall planning and cooperation, specific measures towards strategic planning and continuous strategic management and situational evaluation given the ongoing challenges and changes in the development dynamics in Norway and internationally. Also the lack of clear reflection on a practice of a comprehensive pedagogy for DE in the North played a role in this assessment. Mention has been made of giving consideration to developing a pedagogy for the powerful and rich societies or a pedagogy of true solidarity as the other side of the coin of an empowering pedagogy for the poor. The aim is to ensure that true popular enlightenment takes place (folkeopplysning) affecting attitudes, behaviour, policy as well as social and organizational structures and systems. Given the political, economic, technological and moral divide that exists between North and South DE should therefore inform but also challenge society, organizations and individuals towards fundamental choices. If not it could be seen as popular deception and blindfolding (“folkeforblinding”).
- In mitigation it has to be stated that the impression exists that the RORGs are not the only organizations or DE actors of which this could or should be said. Similar trends are anticipated in organizations outside the RORG network and also outside Norway. Also most encouraging and even courageous developments have been noted whereby the RORGs are willing to take voluntary and proactive steps to turn this situation around.
- The RORG-network is commended for taking this novel route for a northern NGO-network working with DE, for the way it facilitated the evaluation and for the courage to respond responsibly and courageously to comments, criticism, advice and recommendations. With all the problems encountered in one of the first ever of its kind evaluation, the RORG-network has set standards and poses challenges to other development related organizations in the North.

### ***Interaction with the South***

- There is overall goodwill and a critical mass of people of goodwill toward the South in the member organisations of the RORG-network, with particular reference to persons involved in the DE work.
- The nature and extent of interaction with the South beyond project partners and donor relations need urgent attention.
- Finally, The presence of the South in the ‘organisational mindsets’ and in the management need serious attention.

### ***The Millennium Development Goals (MDGs)***

There was a lack of knowledge (at the start of the evaluation process) of the MDGs among the RORGs, despite the fact that the Norwegian government had clearly stated that their South policy is based on the MDGs and also despite continuous information to the RORGs on the MDGs from the RORG-secretariat.

### ***South input to the evaluation and the MDGs***

- The evaluation process has indicated that DE in the North is largely unknown to role players in the South. Furthermore, there is reason for concern about the levels of criticism and even suspicion on the project of DE in the North among NGOs and networks in the South, when confronted with it.
- The evaluation process has shown that: the MDGs are generally regarded with scepticism; it is also seen by some as a continuation of northern dominance, there is a clear lack of enthusiasm in the South about the MDGs.



## Recommendations

A set of recommendations are made, aimed at developing processes and mechanisms within the RORG-network towards improvement of the overall efficacy of its DE work. It is recommended that this process need to be done through adequate strategic networking with role players outside the RORG-network in Norway and beyond, including role players from the South. Also, clear programmes need to be developed to deal with the MDGs in a more structured manner. Finally, it is recommended that the RORG-network consider having a next South evaluation in 3-4 year time, building on the lessons learnt during this evaluation and dealing with the developments emanating from it.

### LIST OF ABBREVIATIONS

DE - Development Education

GE - Global Education

GENE - Global Education Network Europe

IMF - International Monetary Fund

MDGs - United Nations Millennium Development Goals

MFA - Ministry of Foreign Affairs (Norway)

NGO - Non-Governmental Organisation

NOK - Norwegian Kroner (i.e. the Norwegian currency)

NORAD - Norwegian Agency for Development Cooperation

RORG - Rammeavtaleorganisasjon (RammeavtaleORGAnisasjon).

English: 'framework agreement organisation' (with reference to the network of Norwegian NGOs holding framework agreements with NORAD for funding of Development Education in Norway)

SAP - Structural Adjustment Programmes of the IMF and the World Bank

SRG - South Reference Group

ToR - Terms of Reference

WIP Report - Work-in-progress Report

WSF - World Social Forum

WSSD - World Summit on Sustainable Development, held in Johannesburg, September 2002.



# PART 1: INTRODUCTION

The RORG-network (in Norwegian: RORG-Samarbeidet) is a group of Norwegian NGOs doing Development Education (DE) in Norway. RORG is an acronym for the Norwegian word rammeavtaleorganisasjon (RammeavtaleORGanisasjon), meaning an organisation with a framework agreement (rammeavtale) for funding. In this case it refers to framework agreements for funding of DE with the Norwegian Agency for Development Cooperation (NORAD).

Development Education (DE) in its most general and abstract meaning is used in this report as a technical term referring to a variety of educational processes and activities focussing on global developmental issues, and thereby also on North-South issues. These processes and activities could be both formal and informal, i.e. within and outside the formal educational system. Target groups of different projects and programmes could include the public in general, policy makers, specific sectors of the public such as women, children, young people, students, union members, and also political party members, members of a variety of civilian organisations, religious groups and denominations, journalists and others in the media, business organisations, etc.

In this report the terms “the North” and “the South” symbolically represents the global economic, political and moral divide between the global rich and powerful countries (mostly in the northern hemisphere) on the one hand and the global poor and marginalised countries (mostly in the southern hemisphere) on the other. It is acknowledged that these distinctions also apply as cross-cutting social strata in countries of the North as well as in the South. This means that cognisance is taken of the fact that there is also a clear presence of extreme wealth in the South (i.e. represented in the notion of “the north in the south”) and poverty in the North (i.e. represented in the notion of “the south in the north”).

The RORG-network’s 2002/2003 South evaluation started off as a small and seemingly insignificant process within a relatively unknown network of organisations in Norway. However, the fact that a northern network of DE and development-related NGOs decided to be evaluated from the South created significant interest beyond the RORG-network’s own members in Norway. This interest included NORAD and the Ministry of Foreign Affairs (both provided finance for the process), DE actors in Europe and beyond, as well as some role players in the South. On the whole, it turned out that this leap towards allowing the South to do an evaluation of northern NGOs in the field of DE seems to be among the first of its kind. It should be noted, however, that the views presented here does not and cannot represent the South as such.

The novelty of the approach, as well as the novelty of having to conduct a project of this nature in uncharted waters, applied their own pressures on the process. However, the process has opened up and even created new horizons of insight and knowledge in the field of DE and in the field of Development Evaluation. Finally, the process was not spared the fundamental tensions between North and South to the extent that the process could have derailed at any given point in time. This tension needs to be read as an underlying theme of both the

process and the content of the evaluation project.

Three basic themes emerged, which on the one hand assist in understanding this particular project and on the other has guided the project to its conclusion. Ultimately they also formed the glue which held an uncertain, fragile and sensitive and potentially explosive process together. The themes are the following:

### ***The wisdom of taking a long shot at goal***

The South evaluation process was and remains a huge risk on many fronts for both 'the evaluators' and 'the evaluated'.

The most important risks sits round some basic questions: Was it a good decision or even the right thing to embark on this project? These questions emerged in view of the absence of 'templates' or 'best practices' of the same or similar approaches to evaluation of DE. It also surfaced in view of the absence of any forms of certainty about the direction and outcomes of the project. As such, not only the decision to embark on a South evaluation, but also to accept the invitation and offer to do the evaluation, was not anything close to a calculated risk. In football terms, it was not to be considered as a regular shot at goal.

The very nature of this (novel) process was a long shot at goal. Both the RORG-network and those from the South involved were party to this uncertain and risky process. It should, therefore, be understandable that managing such a risky and uncertain process had its own challenges and dynamics.

The wisdom of this long shot at goal can only be determined well after the evaluation has been completed.

### ***The process is both a purpose and an actor***

The management of this evaluation process has been an exercise in North-South relations and cooperation. In this case the relations were qualitatively different from the usual northern-dominated relations in development work. It became a South-North process, i.e. a process in which the South was 'in the driving seat'. An organisation in the North allowed actors from the South to see what is happening in its backyard and to become involved and part of processes to deal with the difficulties encountered.

The learning that took place during this South-North process became a purpose in itself. As such the process became a purpose of the project. Furthermore, the process provided lessons and perspectives on substance issues involved in North-South or South-North relations with reference to development work in general and DE work in particular. Once again, in this case the lessons emerged from turning the normal North-South processes around in becoming a South-North process.

The process itself became an 'active player' - a 'teacher' - and thereby an actor unto the participants from the South and, by all accounts, also to those from the North (i.e. the RORG-network). It became a teacher and actor on issues of substance (i.e. development education e.g. involvement of the South in DE) as well as issues of process (i.e. in North-South, and in this case in South-North, relations). This particular educational activity took place well beyond any planned, desired and anticipated outcomes. The realisation and recognition that the process also became an actor and a subject enriched the

project process in the sense that it posed its own managerial challenges, transcending what could be regarded as the usual or generic evaluation project management procedures. For example, at some stages it was difficult to see whether the project was (still) an evaluation process or whether it became an organisational change management project. This took place when participants from the South were involved (as requested) in processes related to strategic thinking and planning for the future. As such they became subjectively submerged in the Norwegian NGOs and its context, beyond traditionally assumed 'arms length', distanced, 'objective' position of evaluators.

### ***The end is a continuation***

A basic decision was taken at the very beginning of the evaluation process, namely that the final report should not merely be a piece of paper delivered at the end of a process. As such the evaluation process should not be a sterile report-driven process, facing the danger of producing yet another set of papers in a file.

The idea was that the end of the process should already be characterised by and experienced to be a concrete momentum towards change. Therefore, the final report is hoped to be an organic part of a process that has already begun to deal with the insights and recommendations of the evaluation. Such a situation would indicate that the RORGs co-owns and even in a way are being co-responsible for the recommendations and subsequent change. The rationale for this approach is that evaluators do not hold the key to change. The evaluators should facilitate and empower the evaluated to ensure that the solution comes to the fore. As such, the report should not hold any significant surprises for the RORGs.

It can be reported that the project has progressed along a trajectory whereby the outcomes of the evaluation process signalled in many ways a new or different beginning for the RORG-network and the member organisations. In this way the formal ending to the evaluation project effectively becomes the official and formal continuation of an existing momentum towards change or a process of change.

This kind of situation may be a desired outcome of many evaluation projects. In this case indications are that it has to a significant extent worked out to be the case. A two-day joint seminar was held in February this year to deal with the draft of the final report. Participants seemed to have left that seminar with energy to deal with the situation at hand. Moreover, a significant number of the member organisations started their own initiative prior to the draft final report and, based on discussions at that stage, started dealing with issues raised and discussed during the different phases of the evaluation process.



# PART 2: BACKGROUND

## 2.1 DE IN 'THE NORTH'

DE work in Europe and North America is effected through different kinds and levels of organisation. In Europe, numerous organisations and a number of networks are involved in DE processes and activities.

DE work is being organised by means of:

- National networks and/or forums. Countries such as England, Ireland, the Netherlands, France, Belgium, Germany, Austria, Switzerland, Denmark, Sweden, Finland, have their own national forums for DE (See box 2 for useful websites for further information on DE in Europe)
- Europe-wide basis. A Europe-wide network, the Global Education Network Europe (GENE) is in formative stages of development under the auspices of the North-South Centre of the Council of Europe in Lisbon. Interestingly the term DE is being replaced by the term Global Education (GE) with generally the same purposes as that of DE, but defined in broader terms.

### **Box 1: Examples of how DE/GE is understood and defined in Europe**

#### **Example 1: Ireland**

Development Education...

- is an educational response to issues of development, human rights, justice and world citizenship
- presents an international development and human rights perspective within education here in Ireland
- promotes the voices and viewpoints of those who are excluded from an equal share in the benefits of human development internationally
- is an opportunity to link and compare development issues and challenges in Ireland with those elsewhere throughout the world
- provides a chance for Irish people to reflect on our international roles and responsibilities with regard to issues of equality and justice in human development
- is an opportunity to be active in writing a new story for human development

Source: Development Education Ireland (<http://www.developmenteducationireland.org/>)

### **Example 2: North-South Center of the Council of Europe**

- Global Education is education that opens people's eyes and minds to the realities of the world, and awakens them to bring about a world of greater justice, equity and human rights for all.
- Global Education is understood to encompass Development Education, Human Rights Education, Education for Sustainability, Education for Peace and Conflict Prevention and Intercultural Education; being the global dimensions of Education for Citizenship.

Source: The Maastricht Global Education Declaration, 2002 (<http://www.globaleducationeurope.net/>)

### **Box 2: Some notable websites on DE in Europe:**

<http://www.developmenteducationireland.org> (Development Education Ireland)

<http://www.dea.org.uk> (Development Education Association, UK)

<http://www.ncdo.nl> (NCDO, the Netherlands)

<http://komment.nikt.at> (KommEnt, Austria)

<http://www.globaleducation.ch> (Foundation Education and Development, Switzerland)

<http://www.rorg.no> (The RORG-network, Norway)

[http://www.coe.int/T/E/North-South\\_Centre/](http://www.coe.int/T/E/North-South_Centre/) (North South Centre of the Council of Europe)

<http://www.globaleducationeurope.net/> (The Europe-wide Global Education Congress, Maastricht, the Netherlands, 15-17 November 2002)

As part of the general processes of DE/GE multitudes of campaigns (local, national and Europe-wide) and activities are conducted annually, a wide range of very valuable materials are produced (e.g. pamphlets, books, videos, CDs etc.) and services rendered (mainly resource centres of information of which most if not all are internet connected and in some cases purely internet based). The quantification of amounts of money spent on these campaigns and an evaluation of these seem still some way off.

In November 2002 the Europe-Wide Global Education Congress (EWGEC) was held in Maastricht, the Netherlands, under the auspices of the North-South Centre. The theme of the congress was: Achieving the Millennium Goals: Learning for Sustainability.

The congress was a first of its kind in a variety of ways. For the first time European role players in GE, such as parliamentarians, intergovernmental organisations, political parties and a rich variety of civil society organisations convened. It provided them, for the first time, an opportunity to start coming to terms with DE/GE and to develop some mutual agreements towards action in the field of DE/GE. Also for the first time, a small group of persons from the South participated as a group at a (northern) DE/GE meeting. The group met in Maastricht for the first time and for many it was indeed a first encounter with DE/GE. The generic dynamics and differences between North and South surfaced here as well. Two conference statements were issued: One by the Congress itself (The Maastricht Global Education Declaration, see annex 8) and another by the invited group from the South (annex 9).

Some immediate outcomes of the congress have been that the group from the South, on the request of the organisers, agreed to continue their commitment to and involvement in GE in Europe. Another outcome was that in January 2003 the Parliamentary Assembly of the Council of Europe passed a resolution to "...promote global education to strengthen public awareness of sustainable development, bearing in mind that global education is essential for all citizens to acquire the knowledge and skills to understand, participate in and interact critically with our global society as empowered citizens" (Resolution 1318/2003/par.20.1).

## 2.2 DE IN NORWAY

The history of DE in Norway can be traced back to developments following World War II (Nygaard, 2002). It started within the context of Norwegian commitment to the cause of the United Nations and the first movements towards providing development assistance to underdeveloped countries (sic) in the early 1950s (with particular reference to the national fundraising campaign for Aid to India in 1953). An important actor has been The UN Association of Norway, founded in 1946, mandated to inform the Norwegian public on the ideas, organisation and activities of the United Nations. DE efforts could build on the specific culture of popular education that exists within the Scandinavian countries, including Norway, called folkeopplysning (i.e. peoples education, and literally means people's enlightenment).

The political context of the campaign for development assistance in the early 1950s was informed and driven by factors such as:

- Both self-interest and international solidarity, based on the then Labour Party Government's tradition of international solidarity coupled with Norway's positive experience as a recipient of foreign aid through the US Marshall Plan in the aftermath of World War II;
- Fear of the spread of communism;
- Linking Development Aid to national security and defence issues, by labelling Development Aid as "positive defence".

NORAD, previously known as Norwegian Development Aid (Norsk Utviklingsgjelp) since its inception in 1962 until 1968, was at an early stage entrusted with the responsibility for official information on issues related to its activities as well as cooperation with and funding of DE activities of the UN Association and some NGOs.

Prior to 1975 official funding for DE activities carried out by NGOs had been made available on a small scale only. It all changed in 1975 when NORAD signed a framework agreement (a four year funding agreement) with the Workers Adult Education Association. This framework agreement became the basis for, as well as encouragement and financial support to, a wide variety of Norwegian NGOs towards doing adult education in the Nordic tradition of folkeopplysning (people's enlightenment) in general. NORAD's basic idea was to reach the Norwegian public as widely as possible through their own organisations and to engage Norwegian civil society in international development issues.

With this funding available, intended for the larger national umbrella organisations and development NGOs, Norwegian NGOs were in a position to pursue their own agenda beyond and outside of the marketing and fund-raising approach dominating the DE work of the larger relief agencies.

A separate funding arrangement was established to fund DE projects within minor and regional/local organisations and institutions on an annual basis. Some 60-100 NGOs have annually received smaller amounts of DE funding from this arrangement.

Today (2002), some 35 Norwegian NGOs hold framework agreements with NORAD, including the five larger Norwegian relief agencies that have a separate status in their relations with NORAD. Together, these NGOs represent the bulk of Norwegian civil society, including adult education associations of political parties, the Church of Norway (with a special branch established for the purpose of DE), the Norwegian Confederation of Trade Unions, women's organisations, youth, school and student organisations, the national network for community linking groups and a number of large and small aid, relief and solidarity organisations.

Since 1975 NORAD was the main support structure for DE in Norway by providing:

- Funding to the UN Association and other DE NGOs
- Professional advice and a discussion forum
- A common understanding that DE should encourage critical debate on a broad range of issues related to international development assistance.

This dynamic seemed to have changed, and was even perceived as coming to an end, in the 1990's. The following factors seemingly contributed to this dramatic change:

- The volume of funding for the DE activities of NGOs had grown larger than NORAD's own budget for information;
- Some of the larger relief organisations (which had grown considerably during the years) had budgets for information, PR and fund-raising far bigger than that of NORAD's own information budget;
- NORAD and ODA suffered from 'aid-fatigue' and the leadership of NORAD felt it was time to concentrate their limited resources for information on what NORAD was actually doing (bilateral development assistance) and not on an ever-increasing number of themes and issues NGOs felt relevant for the wider DE agenda.
- Increasingly, and without much public debate, Norway at that time adjusted its policies to the SAP-approach (Structural Adjustment Programmes) of the World Bank and the IMF. Within NORAD - and in particular within its office for information - there were people that wanted DE to stimulate critical debate on these issues within a broad North-South perspective, while others apparently wanted to avoid such debate in public and focus NORAD's information on its core business, bilateral aid.
- These factors led to changes in the way NORAD did information and reorganisation and changes in the administration of funding of DE through NGOs creating tensions between NORAD and the NGOs.

During the turbulent 1990s the key issue remained the soul and scope of the DE agenda.

The following are worth noting:

- As stated before, the historical roots of DE in Norway were closely linked to providing information on development aid, the marketing of development aid/assistance efforts and efforts towards fundraising for development assistance. This was especially the case amongst the major relief organisations.  
Interestingly, an MFA evaluation of NORAD in 1984 found that the objective for funding DE was to increase public support for increased Norwegian ODA. It is not surprising that at the time the common terms for DE in Norway were information on developing countries (u-landsinformasjon) as well as information on development assistance (bistandsinformasjon). These were used interchangeably as synonyms.
- The RORG-network at the time took a different line towards establishing a different rationale for DE. The approach was that DE should be given a more prominent role in international development cooperation based on a comprehensive North-South perspective. It should contribute to an improved North-South dialogue with the ultimate aim of achieving global sustainable development as the basic rationale for government funding. Such an approach was considered to be in accordance the recommendations of the Brundtland Commission (Our common future, 1987). The term used to reflect and promote this broadened agenda for DE was to refer to DE as North-South information (nord/sør informasjon)
- The efforts of the RORG-network and others yielded positive results through the Report of the



government-appointed Commission on North-South issues and Development Assistance (NOU 1995:5 Norsk sør-politikk for en verden i endring), in which DE in Norway was placed firmly in the context of Norway as an actor for global sustainable development. The report, later largely endorsed by the Government and parliament, is still the formal basis for government policy on DE (see extract in Box 3) and for NORAD guidelines for financial support for DE (see extract in Box 4).

- The results of achieving this political breakthrough were, in the view of RORG-officials, however limited in value. This was due to what was perceived as divide and rule tactics at the time by NORAD towards the RORG-network. The actions of NORAD, at the time, were regarded as undermining a collective advance and common understanding towards a different and broadened perspective on DE.

### **Box3: Norwegian Government policy on DE**

#### **Extracts from the Report of the government-appointed Commission on North-South issues and Development Assistance (NOU 1995:5 Norsk sør-politikk for en verden i endring)**

Norway is a co-responsible actor in a global society where poverty, unjust distribution, pollution and the use of resources are challenges for a common responsibility.

A development that will ensure welfare and human dignity for all will increasingly have to be managed within global democratic structures.

Information and awareness-raising is important to induce changes, but also to create acceptance of such changes. The information work shall contribute to providing broad layers of the Norwegian society with knowledge of and insights into the global challenges facing us.

The following up of the recommendations of the commission for Norway's North/South policy depends on the positive support and understanding of public opinion. We have to acknowledge that we are in a process of global change that will require critical engagement and a search for new insights and new solutions.

Information and awareness raising thus have to be understood in a broader perspective aiming at stimulating active popular participation in these processes of change. It has to be a main goal for information and awareness raising to prepare a political will within broad layers of the population for the consequences required by global sustainable development.

Such a development will i.a. require a change to sustainable production and consumption patterns, and changes in the unjust distribution of resources and wealth in the world.

In such a process of change it is clear that there are both common and competing interests.

If attitudes are negative, the danger will increase for changes being enforced through crisis, force and war.

*(Unofficial translation)*

#### **Box 4: Goals for NORAD financial support to DE**

(extract from NORAD guidelines, approved by MFA in 2001)

- The goal of the framework agreement arrangement is to enable a variety of Norwegian NGOs to carry out broad-based Development Education in Norway on north-south and development issues of current interest and importance.
- The funding arrangement should furthermore stimulate:
  - critical engagement and debate on current north/south and development issues,
  - cooperation with the South and ensuring that perspectives and views from the South are drawn into DE,
  - cooperation among Norwegian NGOs and other Norwegian actors,
  - development of competence within the organisations, on DE as well as on north/south and development issues.

The arrangement is not intended to support information activities primarily aimed at promotion, fund- raising, marketing and project information.

*(Unofficial translation)*

## **2.3 THE RORG-NETWORK**

The RORG-network was established in the early 1990ies by NGOs holding framework agreements with NORAD (RORGs), which managed to develop agreements towards some levels of cooperation. Following agreement between NORAD and the RORGs two part-time coordinators were employed in 1991, substituted from February 1992 with one full-time coordinator. The RORG-coordinator was entrusted with the task of coordinating activities and stimulating capacity-building within the RORGs, as well as facilitating communication between NORAD and the RORGs. During the first years there were disagreement between NORAD and the RORGs on the ownership of the secretariat of the RORG-network in addition to conflicting views on the DE agenda. Most RORGs perceived changes in NORAD policy as undue pressure to act as 'PR agents' for NORAD.

The main areas of co-operation within the RORG-network was:

- lobbying through political processes for increased funding and the strengthening of DE in Norway,
- pushing issues of common concern related to the NORAD administration of the framework agreements and
- stimulating debate on DE issues and to exchange information between the RORGs.

For several reasons, the level of conflict between NORAD and the RORG-network eased by the end of the 1990s. Today there is closer contact and cooperation between NORAD and the RORG-network, despite the fact that the role of NORAD in DE, apart from its administration of DE funding, is much reduced from what it used to be.

The RORG-network played an active role in promoting and renewing DE in Norway in the 1990s, with a shift of focus from promoting and increasing development assistance to critical debate and engagement on broader North-South issues, stressing the importance of southern perspectives and North-South dialogue on DE.

The RORGs represent a wide diversity of Norwegian civil society, ranging from adult education associations of political parties, broad social movements like national women's and youth networks, research institutes, as well as the church, the national confederation of trade unions and others, to internationally oriented organisations engaged in development aid, linking and twinning and international solidarity.

In 1999 the informal and loose RORG-network was formalised with its own statutes/conventions, outlining its aims, procedures for membership and governing structures.

According to its constitution the aim of the RORG-network is:

1. to constitute a forum for debate on DE in Norway and
2. to be an arena for strengthened coordination, cooperation, initiatives and mobilisation for the broadest possible range of DE in Norway.

An Annual General Meeting (AGM) receives and act on the annual report, decides on policy for the organisation, admits new members and elects a Steering Group. The Steering Group exercise oversight functions in the interim period between AGMs.

In recent years (until 2002) some +/-30 NGOs have benefited from the framework agreements with NORAD, of which all but two have been members of the RORG-network. In 2002 these RORGs received a total of NOK 17 million in NORAD-funding for DE. New applicants were considered by NORAD in 2002, raising the total number of RORGs to 33 for the next 4 year-period. Total funding in 2003 increased to NOK 22 million.

The extent of the DE work done by and in members organisation vary in the sense that some organisations are only doing DE in terms of annual campaigns and/or research work and research products, others have a department with dedicated staff to do DE in the organisations, for others the DE function is either a part time position of one person or part of other responsibilities in the relevant organisation. Other difference in terms of target groups, ideological and political differences, organisational cultures etc. both enrich and complicate the composition of the organisation and the work being done.

The means for doing DE include research publications, magazines, pamphlets, posters, policy interventions, public meetings, courses in formal and informal education, public awareness campaigns, exposure trips to the South, exchange programmes between Norway and persons/organisations from the South also visits by persons from the South to Norway etc. The topics and foci of activities and products differ from organisation to organisation and 'as needs may determine'.

The RORG-network runs one of the most comprehensive web-sites in Norway on North-South- and development issues.

## **2.4 THE BACKGROUND AND RATIONALE FOR A 'SOUTH EVALUATION'**

Evaluation is not new to DE work in Norway. Comprehensive evaluation projects was carried out in 1984 and in 1998. These were commissioned and promoted by the previous Ministry of Development Co-operation and Ministry of Foreign Affairs respectively. The motives were to ensure quality and effectiveness in government-funded DE as well as the administration of the funding arrangements.

NGOs have long felt the need to be proactive in being evaluated, i.e. to be in a position to determine the rationale and parameters for such evaluations themselves. In addition, the need is felt that qualitative issues related

to strategic questions, such as those related to purpose (why?), substance (what?) and means (how?), regarding their own organisations and projects must be addressed. Financial and other capacity factors, coupled with suspicion on the political and funding motives of the government-initiated evaluations, have also played a role in creating apprehension towards evaluations.

The report of the last RORG-evaluation, *Evaluering av informasjonsstøtten til RORGene* (MFA Evaluation Report 9/98), was to a large extent a favourable evaluation for the RORGs, concluding that the results in terms of DE provided are satisfying, both in terms of efficiency and in relation to the objectives of the appropriation. The evaluation report later provided the basis for increased funding to the RORGs. The report also focussed on the management and administration of funds. As a follow-up of this evaluation report, the MFA commissioned the production of ready-made schemes for evaluation of the most common DE-activities among the RORGs, to be used as easily available and low-cost evaluation tools for the NGOs in order to stimulate reflection on and improvement of their different DE activities. However, useful as these schemes may be, it is felt that these tools did not respond to the need for an assessment/evaluation of the overall direction, content, effectiveness etc. of DE in Norway in general.

In 2001 the RORG-network decided on its own to be subjected to an evaluation from the South, linked to the increasing centrality of Millennium Development Goals (MDGs) within international development cooperation.

*Reasons for the decision include:*

- To assist the RORG-network in dealing with fundamental questions related to DE in Norway, such as: What difference does DE make on National level? What should be the basic direction for DE in Norway?
- To provide assistance to counter the distorted and unbalanced northern dominated perceptions and opinions on the South, on the development work and to promote global understanding and dialogue between the North and South. The members of the RORG-network have long argued that DE in the North must reflect the perceptions and perspectives on current global issues in both the south and the north.
- That DE is basically motivated by a desire to change the world to be a better place, fighting poverty and injustice. Thus, the part of the world most hit by poverty and injustice, the South, should have a say in how DE is done in the north.
- To strengthen North-South relations in the field of DE and to get southern perspectives, input and recommendations on how to do DE in Norway in the new millennium.

*The focus on the MDGs was motivated by the following considerations:*

- The search for some common goals within a broader context of promoting global understanding and dialogue as global citizens and to contribute in fighting global poverty and injustice.
- It was felt that such common goals might be reflected in the MDGs adopted by the UN Millennium Summit in 2000. These are the goals that the international community has committed itself to reach by 2015 and to which the international community and the governments of the world could and should be held accountable.
- The questions, however, were:
  - Do governments, NGOs and civil society - in the North as well as in the South - share these goals?
  - Could the MDGs serve as some common reference for DE?
  - Should DE promote the MDGs as signs of realistic hopes for a better world?
  - Should DE unmask that the MDGs are unrealistic and just another set of empty promises?
  - What should be the role of DE in light of the MDGs?
- The UN was preparing a millennium campaign in support of the MDGs and the Norwegian government had decided to let the MDGs guide its new action plan for fighting poverty in the South.



## PART 3: MAIN FINDINGS

This section presents the main findings of the evaluation, with particular reference to the assessment of the efficacy of the RORG-network's DE work. Given the generally qualitative nature of issues addressed, this section provides the basis for the key assessments in as much detail as possible.

Each section consists of two basic elements, namely analysis of the issue at stake as well the presentation of comments, evaluation and indications regarding a way forwards.

The basic material for the main findings contained in 3.1, 3.2 and 3.3 was generated from the following events:

- A questionnaire sent out to the member organisations (April 2002), see annex 5;
- Processing and analysing responses (April/May 2002);
- More in-depth discussion of responses with representatives of individual RORGs (June 2002);
- A follow-up roundtable discussion with the RORGs on the outcomes of the questionnaire and field trip (June 2002);
- A Work-in-Progress Report (WIP report) and responses to it (August 2002);
- A second round of discussions with organisations around strategic management issues, in most cases with broader and different participation beyond that of the RORG representatives in organisations (October/November 2002);
- A joint two-day seminar related to content and strategic management (February 2003);

Further details can be found in annex 7: Process components and management.

The material and insights developed on content and strategic issues through each of these events and processes will be discussed. The discussions on these matters hold important implications for DE in Norway by the RORGs, Norway in general and other regions in the North as well.

The significance of the questionnaire and the responses is that these provided a set of first impressions on issues relevant to this south evaluation on the efficacy of DE work by the RORG-network. As such, these first impressions became lasting issues in the sense that they not only developed into becoming 'benchmarks' for this evaluation, but also determining the core issues to be dealt with in follow-up action.

### 3.1 GENERAL STRATEGIC ISSUES

Issues related to strategic management of DE by the RORGs emerged as a very basic issue, a central

theme, a basic requirement for DE work and a matter addressed in various ways in the recommendations. The success or failure of the RORG-network's DE work at this point in time is determined by the quality and extent of the strategic management and issues related to strategic management. The issues that emerged in this respect were related to:

### **3.1.1 Capacity**

*Analysis:*

The issue of capacity and its impact on efficacy of DE work in the RORGs emerged from reviewing a seemingly mere administrative part of the questionnaire (with reference to the position of the person responsible for DE work) and became a significant part of the larger picture which started to emerge from the questionnaires, the interviews, the round table discussion and the focussed discussions on strategic management.

*Comments, evaluation and way forward:*

- Different positions and roles for DE work exist within different RORGs.
- Given the complex nature and immense task of DE, as it emerged during the course of the project, it is inconceivable that such limited capacity in terms of human resources to deal with DE actually exists in organisations.
- In some cases new personnel appointed for DE work were unsure as to what is expected from them in their organisations.
- The obvious capacity problems initially related to the position of the person(s) doing DE in an organisation became a bigger discussion related to capacity of some organisations on the whole in dealing with the challenges of DE. Creative and lateral options has to be looked at in terms of maximising existing capacity, through effective networking and cooperation between member organisations, other role players outside the RORG-network in Norway as well as outside Norway e.g. in Europe.
- The limited capacity designed and allocated to DE in the respective RORGs reflects a limited understanding of DE within the RORG-network as a whole and in the different organisations as well. In addition, questions have to be raised regarding the priority of DE and its integration in the life and work of many RORGs as well as the overall efficacy of DE and the chance DE actually has to have and maintain good quality of efficacy.
- In subsequent discussions the issue of operational fragmentation of efforts, competition, undue overlaps etc. started to surface. It should not be surprising, in view of the fact that member organisations do not know each other's programmes. Persons responsible for DE work in different RORGs often do not know each other. Some meet during the AGM only. In other cases it turned out that newly appointed persons were not clear as to who or what the RORG-network is.
- Problems related to an effective and in-built culture of networking amongst organisations and individuals added a further dimension to the question of efficacy of DE work related to capacity in organisations and the RORG-network at large.

### **3.1.2 Substance, vision and mission**

The detail of these matters centred around questions related to the understanding of DE in the north and in Norway (annex 5).

*Analysis:*

The question was generally aimed at providing the evaluation team with the opportunity to learn what DE in the North in general, and Norway in particular, is all about and to gain some input on this from the RORGs. Diverse or even diffused themes emerged, some self-standing, some overlapping and others inter-linked.

#### *Comments on DE in the North:*

- The diversity of opinions and views provided insight in different aspects, or a wide variety of issues, of what DE in the North is or could be. As such, the responses could be seen as reflecting the result of a brainstorming session.
- The differences in opinions, or even differences in focus, by different RORGs reflect potential mutual or organic enrichment and by and large assure potential for complementarity within the RORG-network. As strength, it also reflects the richness of different positions and approaches to DE work by the RORGs, if it is assumed that the RORG-network is properly functioning as an organic unit i.e. a network.
- The RORG-network is unfortunately not functioning as an organic unit. This was confirmed in so many words during a number of individual and joint meetings. Therefore, these differences on understanding of what DE is are functioning as a weakness at this point in time. It mainly reflects diffusion and disagreement, rather than complimentary differences.
- The nature of these differences represents further cause for serious concern as viewed from the South. The concern is based on the assumption that DE is done as a service to the South. Seen from this perspective, it becomes imperative to deal with these matters of basic differences within the RORG-network and also with organisational/project partners and with a wider constituency in the South to ensure improved service to and value for the South as a whole.
- The discussions on DE in the North, outside Norway, has also indicated that there is still some way to go to engage in some reflection on a more comprehensive and general view on what DE is or should generally be in the North.

#### *Comments on DE in Norway:*

- The general comments, which were presented with regard to DE in the north, apply here as well.
- There is a need for much tighter, internal strategic discussions on the understanding of DE within the individual RORGs, similar joint discussions and processes on this issue within the RORG-network and probably other organs of civil society outside the RORG-network as well. This is particularly important taking into account that DE is supposed to be of service to the South in Norway at a national level.
- It is to be expected that differences in opinion and approach may exist between the evaluated and evaluators in an external stakeholder evaluation, even more so in a South to North stakeholder evaluation of a development organisation. In this case the situation was not only different. It was also more complex. The core business of the RORGs, i.e. DE, turned out to be rather uncertain in the mind of the RORGs. DE in 'the North' in general, and Norway in particular, was also a practice to which the participants from the South were not only totally unfamiliar with, but also fundamentally suspicious about. The decision to involve the South in an evaluation of the RORGs was also treated with a significant amount of suspicion.
- The lack of conceptual clarity from both the evaluators and the evaluated, in addition to fundamental suspicion on the side of the evaluation group from the south, had a major, even defining, impact on both the nature and the pace of progress of the evaluation project. The issue re-emerged constantly in discussions on the work of the RORGs as well as on the nature and functioning of the RORG-network and its member organisations. This contributed to an increase in the level and intensity of basic suspicion amongst participants from the South. The evaluation process had to be managed in such a manner that clarity on and trust in the core business of the organisation, as well as the main focus of the evaluation, had to be developed. At the same time, acceptable and manageable levels of mutual trust between the RORGs and the evaluators had to be established and maintained.
- Fundamental strategic questions raised with the RORGs included:

- What is the critical self-understanding or self analysis (contextual analyses) of the Norwegian context within which and unto whom DE is executed?
- Whose agenda is being pursued? That of the global powers in the North? Fairly representative and authentic voices, positions and opinions from the South?
- What is the/your bottom-line for doing DE? Given the political, cultural, economic and especially the moral divisions between the global north and the global south, would mean that fundamental choices will have to be made. Persons will have to make fundamental choices. Policies will have to reflect at least struggling with and otherwise reflect that choices have been made, choices whereby the injustices and inequity in the South and towards the South are highlighted and reflected. The question that came up is whether DE is busy with people's education and enlightenment (folkeopplysning) or whether it is actively obscuring reality and blindfolding people and society ("folkeforblinding")?
- Is there a pedagogy available in doing DE in the Norwegian context? A pedagogy reflects the bottom line of change to be achieved, the rationale and also means (strategy or strategies) to do so. What about the development of a pedagogy for the rich, the powerful and the comfortable in the North/Norway/Norwegian society? If solidarity with the South is so important, what about a pedagogy for solidarity? Such a pedagogy is supposed to assist people to see the reality within which they live in a critical and hopefully different light, i.e. the reality in which they participate and live, the reality that they benefit from and also the reality that not only creates wealth, but also creates and sustains poverty and injustice. Of particular importance is to see the reality 'from beneath' as the South sees and experience it. Programmes, as the need dictates, for both reform and radical transformation of individual attitudes and behaviour, of organisations (e.g. different levels of government authorities, government services such as education and educational institutions, businesses and business organisations, civil society organisations) as well as socio-economic policies, systems and governance, will have to be developed in conjunction with the South.

#### *Evaluation and way forward:*

- It seems clear that the organisational memory on the history of DE in Norway, the battles in the 1990s for the heart and content of DE, must have faded away with what generally seems to be a new and different generation of DE actors in the RORG-network. Also, there is little if any knowledge and insight into the developments related to DE and/or GE outside Norway, despite regular information provided on the matter from the RORG-secretariat. Little if any structured discussions are taking place to provide some systematic and coherent view on DE. How can an organisation that has forgotten, or does not know, its roots have historical impact beyond ad hoc and historically unrooted activities? The answer is self-evident.
- How could the efficacy of the core business of an organisation be evaluated under conditions whereby the evaluated organisation has little if any coherent conceptual clarity on neither the subject matter nor having a coherent view on the core business?
- The history and nordic tradition of "folkeopplysning" needs to be given attention.

In mitigation of the RORG-network and the PRG the following need to be noted:

- A language gap existed. Most organisations conduct their DE work in Norwegian. Literally translated, the two terms currently used by the member organisations on the one hand refer to 'information work' and on the other to 'people's education' or 'people's



enlightenment' regarding North-South issues and development work in the south. The introduction of the English term 'DE' was new to most organisations and their representatives.

- Uncertainty and lack of clarity in the use of the term DE and the practice thereof exist in other organisations and networks outside Norway in Europe as well.
- The participants in the project from the South were not at all versed with DE to sense the subtleties related to DE in Norway.
- The involvement of actors from the South beyond the PRG indicated not surprisingly total ignorance about and suspicion towards DE in the North.

Regardless of these caveats on the understanding of DE the following issues were discussed, sometimes with a serious level of tension, and remain to be answered:

- If 'pure information work' is the focus, then a critique of the factors playing a role in the selection and presentation of information need to be done and evaluated.
  - If 'education' (here people's education), which implies a process of change and growth (including the presentation of facts) is the focus, then attention should be given to some contextual pedagogy related to DE in the North in general and in Norway in particular. The issue of a pedagogy also applies to the former point on information work.
- Lack of conceptual clarity on the core business of the organisation raises obvious questions on the efficacy of DE by the RORG-network and the RORGs. This does not imply that the work being done is insignificant. There are numerous examples of good effects, successes and even lasting successes in the course of DE activities. For example, significant numbers of people's attitudes and opinions have shifted due to exposure to the work of some of the RORGs. An overall or "macro" assessment of the efficacy of DE work by the RORGs may, however, differ from an assessment of "micro" successes 'on the ground'. An overall assessment of the efficacy indicates serious difficulties related to the efficacy of DE on this very fundamental point of both content and strategy. It is simply inconceivable that proper strategic planning and management can function without addressing in an explicit manner the question of vision or purpose (why?) and the core business of the organisation (what?). This weakness was confirmed during follow-up discussions and during the strategic development processes.

### 3.1.3 Setting of goals

#### *Analysis:*

The question (annex 5) tried to solicit information on the strategic goals set by the RORGs over the last five years. It attempted to test the relationship between the overall thinking on DE in the North and in Norway on the one hand and on the other the practical goals set out to address the overall aims of DE. It also tests the levels of strategic management and thinking.

#### *Comments and evaluation:*

- Considered together with previous questions and discussions, the quality of answers received raised the issue of quality of strategic management. How is it possible that DE work could have taken place in what seems to be a clear lack of strategic insight into the core business of DE, lack of conceptual clarity on the subject matter and lack of memory on the history and historical task of DE in Norway? Little if anything seemed to have moved the members of the RORG-network to look critically into what they are doing and to consider whether strategic changes have to be made, despite regular prompting in that direction from the secretariat.
- On the other hand, and in line with previous comments, the responses to this question provide

insight in what DE could achieve and insight in the diversity of different types of organisations.

- The initial impression is that a strategic realignment between the RORGs and all other DE actors will have to be addressed for the sake of being of service to the South. Such a process may have to address closer co-operation, less fragmentation, less overlaps or duplication of efforts, less competition, etc. Agreement on overall goals for DE has to be addressed as well, whilst acknowledging different legitimate organisational interests and areas of concern and expertise.

### **3.1.4 Managing strategic changes.**

*Analysis:*

The question was aimed at trying to assess the extent and/or levels of critical, albeit self-critical, reflection of DE in the RORG-network. The question attempted to gain insight in the relation between assumed critical thinking on substance, vision and mission of DE and strategic realignment or strategic adjustment.

*Comments, evaluation and way forward:*

- The responses indicated that most of the work continues along established lines of work and thinking with little if any critical thinking on it. These were confirmed during most of the interviews.
- The basic points expressed above (in 3.1.3) apply here as well.
- The questions on and problems related to efficacy are obvious.

### **3.1.5 Performance appraisal and strategic management**

*Analysis:*

The question (annex 5) was aimed at getting a sense of self assessment and whether any formal or informal performance management or performance appraisals are in place.

*Comments, evaluation and way forward*

- It is certainly difficult to assess responses in the absence of access to detailed plans. However, such information is not regarded as absolutely necessary given the level of the evaluation and nature of the evaluation.
- Qualified answers mostly state “yes” on practical and measurable short term issues or projects. Rather upfront and very honest doubts were expressed whether these responses measured up with the organisations’ own stated larger DE goals and the impact on the bigger picture in Norway and/or the targeted constituency or target groups.
- Those who provided an unqualified ‘yes’, or ‘yes’ with explanation, mostly emphasised quantitative aspects of the work. Bigger impact or impact on bigger issues of vision and value are not addressed or not adequately addressed.
- The need for more detailed in-depth organisational evaluation processes and procedures were expressed in a number of cases.
- Once again the need for intensive and extensive strategic planning and strategic management of DE work in the RORG-network as a whole and its member organisations in particular has to be stressed. The absence thereof, as reflected in dealing with the meeting of strategic goals, augments the existing notion that the overall efficacy of DE work in the RORG-network is seriously compromised.

## **3.2 INTERACTION WITH THE SOUTH**

### **3.2.1 Nature and extent of interaction with the South**

*Analysis:*

Gaining impressions on the extent and nature of interaction with the South was felt to be necessary, based on the assumption that the DE work conducted by the RORGs could generally be regarded as a service to

the South or work being done to benefit the South in the sense that DE want to promote the South, the case /cause of the South, and to ensure that the South has an impact on Norway.

*Comments, evaluation and way forward:*

- An overall positive disposition towards interaction with the South is eminent.
- The quality and content of answers provide generally a wide variety of types, levels and frequency of interaction with the South.
- Some organisations and some pockets in organisations display appreciable levels of contact and interaction with the South.
- Once again, if these responses were presented as per organisations on a comparative scale or chart it would reflect reasons for serious concern for some organisations, taking into account the overall aims of DE. Serious concerns exist on the nature and extent of the interaction with the South, which in some cases appears to superficial, condescending, ad hoc etc.
- The nature and extent of interaction and sustained interaction with the South beyond project partners and donor relations need urgent attention for the sake of the self declared DE tasks and goals. It is impossible to meet goals and aims in DE work with seriously limited and even flawed interaction with the South. This cannot continue as a general state of the network. The network needs to address the matter, albeit in a manner of peer review. It needs to be reiterated that the north has a permanent presence and influence in organisations of the South. The reverse is not true. The matter can and should be reversed in the RORG-network as a network and in the life of member organisations.
- The South as an area or theme has not received thorough systematic and critical thinking. The South is not merely a geo-political area but also a challenge towards fundamental moral and socio-political and economic policy choices, relating to the way the world is perceived, personal choices of solidarity, taking sides, policy directions, vantage point for analyses and the obstacles and difficulties it poses or may pose in Norway. North-South partnerships would also mean rethinking the way organisations work, how the organisation is managed and decisions are taken, priorities set and budgets set and monitored. The question is whether DE in Norway has indeed contributed towards solidarity with the South as an overall policy position and vantage point for development policy and evaluation? The general impression is that this has not been the case.
- Inadequate or even superficial interaction with the South in DE will of necessity affect the efficacy of the exercise. This position will become further elaborated and enhanced by the discussion under the next question.

### **3.2.2 Impact of interaction with the South on organisation and constituency or target group**

*Analysis:*

The aim of the question (annex 5) was to see whether the extent and quality of interaction with the South might have any effect on the matters raised in the question. The hunch was that if serious attention is given in DE to the 'uncomfortable side' of North-South relations (aspects critical of the North with particular reference to fundamental critical issues from the South towards the North on development matters), the message may either sit uncomfortably with some constituencies and/or may have an effect on the way DE is understood.

*Comments, evaluation and way forward*

- The responses indicate that (even the often limited and flawed) interaction with the South certainly has an overall positive impact on the organisation and its programmes.
- It is assumed that the manner in which DE is generally understood, as well as the quality and

extent of interaction with the South, as indicated and discussed above, play itself out in this issue as well.

- It was thought that expressions and analyses of the South on development and North-South relations may not sit comfortably with all parts of the Norwegian context, in the sense that it will of necessity be critical of the North with the inclusion of Norway. This not being the case raises some serious questions:
  - Do those organisations and/or individuals in the South, with whom organisations interact with, present or pose critical questions or critical views? Are they empowered to do so?
  - Are opportunities created to engage with critical or uncomfortable questions and issues?
  - Are Norwegian organisations or people so impressed by project or general development successes that critical issues have no (adequate) space in DE work?
  - What happens to people who do gain better or different views, perceptions, deepened understanding and awareness of development issues? Are these nurtured and sustained?
  - How does the changed understanding of development issues affect the overall policies of the organisation or the society's or government's policies on development?

Clearly, there are no simple answers to these questions. Improving the efficacy of DE by the RORG-network would require a comprehensive process whereby these questions and issues are addressed strategically on different levels, namely on the macro level (i.e. on societal level), meso level (i.e. middle level as in the level of networks and organisations e.g. in Norway) and micro level (i.e. on personal level).

### **3.2.3 Stakeholder appraisal on messages regarding the South**

#### *Analysis:*

The aim of the question (annex 5) was to 1) test whether there is any feedback from the primary stakeholders of DE in Norway (i.e. the constituency or members etc.) on the message related to the South and DE work in general and 2) to assess the effect of such feedback on the organisation and its message regarding the South. In some way this question also aimed to take the previous question a step further.

#### *Comments, evaluation and way forward:*

- On the whole, where feedback was given, it seemed to be positive and seemingly of value to the organisation or the DE project.
- The need for more structured processes to solicit feedback has been expressed.
- A question emerging in the background is what the feedback or general reaction to projects and DE work would be if the 'uncomfortable and critical' aspects of North-South issues are allowed to surface and addressed more explicitly and in more structured way?
- An encouraging aspect is the positive and warm response from Norwegians to 'authentic voices' from the South. On the other hand, it also became apparent in some of the interviews and joint discussions that the general appreciation from the South should also be understood as a response whereby persons from the South say what people would like to hear or what 'sooths' Norwegians and Norwegian organisations.
- On the whole, continuous evaluation and in particular Norwegian stakeholder evaluation is essential to improve and ensure efficacy of an agreed course of action, albeit in individual organisations and/or RORG as a network. The need for evaluation should not be imposed or felt to be imposed from outside (e.g. NORAD or MFA) and viewed with suspicion, as has been the case in the past.

- It is encouraging that some organisations are in the process of broad ranging evaluations or are moving towards such processes.
- Capacity to conduct evaluations has to be part of overall strategic thinking and planning.

### **3.2.4 On raising controversial / uncomfortable issues as per positions in the South (link with previous question)**

#### *Analysis:*

The question (annex 5) was aimed at testing the extent to which RORGs are willing to take up the differences between North and South. Positions stated from the South are very often not appreciated by and in the North, given the fundamental and pragmatic levels of criticism towards the North in relation to developmental issues.

#### *Comments, evaluation and way forward:*

- Appreciation for the quality and extent of the openness towards criticism in the Norwegian democracy and democratic culture has to be expressed and recognised.
- Comments on previous questions apply here as well, in particular regarding the testing of the depth of the democratic culture in organisations, networks, society at large, and the government of the day, particularly when it comes to the uncomfortable and critical issues in North-South relations. Some experiences and observations during the limited visits and from being exposed to Norwegian society leave a strong notion that there are areas of concern which are not adequately challenged or tested, either in formal and/or informal ways in the DE work.
- Another concern that appeared in responses to the questionnaire and in subsequent discussions and meetings where issues of fear and self-censorship in DE work. Such issues were raised with particular reference to fear of financial reprisal from NORAD or the government, if positions different to or critical towards policies of the government of the day were raised. These issues should not be swept under the carpet.
- Seen from the South, and in terms of the interests of the South, the efficacy of DE cannot be rated high if there is a general tendency to shy away from presenting and being in solidarity with dissenting views from the South. This is particularly the case if the issue of solidarity with the South is receiving a high priority in DE. Undue softening or blurring of positions from the South which are critical to the North and Norway could be regarded as dishonesty by design, regardless of how it is being packaged for Norwegian consumption.
- It should not be left to individuals or individual organisations to address these issues related to fear and self-censorship. This is a collective challenge to the RORG-network. Appreciation for and support and constructive involvement from the South has to be solicited on this matter as well. This opens the discussion on South to North solidarity as well.

## **3.3 THE MILLENNIUM DEVELOPMENT GOALS**

### **3.3.1 The role of MDGs in DE work**

#### *Analysis:*

The questions (annex 5) sought to gain insight as to whether the RORGs are using the MDGs in DE work. The reference to and inclusion of the MDGs took place in line with the agreement reached at the AGM and the terms of reference (annex 1) for the evaluation.

#### *Comments, evaluation and way forward:*

- Not much was anticipated, given the general lack of knowledge about the MDGs in civil society

both in the North and the South.

- The fact that most, if not all, of the respondents and those interviewed were not aware of the Norwegian government's own policies on addressing poverty based on the MDGs says much beyond words about the RORGs, as well as of the Government, who seems to indicate that its policies on the MDGs were developed in consultation with civil society.
- Given the fact that the RORGs are specialising in doing DE work, it could legitimately be expected from them to have knowledge of the latest development issues and therefore the question is relevant. Ultimately, the relevance of the question is due to the fact that the agreements on the MDGs have become part of the daily reality for the South in the sense that government policies in the South are bent on addressing these goals just as development policies in the North, from governments and development institutions, are based on and often limited to these agreements.
- In a way the ignorance about the MDGs (at the time) did not come as a surprise. It illustrates the notion in the South and in the North of the 'secretive' way in which the MDGs were negotiated and are being dealt with. Lack of knowledge of the MDGs is a serious reflection of the process of their adoption.
- A clear need was expressed to deal with the MDGs in a more systematic and critical way in terms of projects in the South, partners and others in the South and in DE work in Norway.

### 3.3.2 Anticipated trends in views from the South

#### *Analysis:*

The questions (annex 5) was aimed at providing some sense of the quality of knowledge and exposure to the South in general and the mood in the South on development issues, North-South relations and the MDGs in particular.

#### *Comments, evaluation and way forward:*

- It was indeed disconcerting that a substantial number of responses did not venturing to reply to this question, but on the whole, a good mix of responses was provided.
- The positive disposition towards learning from the South, or wishing to hear authentic voices (opinions) from the South, may just turn out to be the engine for constructive engagement with the South or opinions and views from the South. This disposition has indeed augured well for this evaluation process and was indeed part of the glue that held the project together.
- The assertiveness of some responses not to accept anything coming from the South or presented as representative of the South in an uncritical manner or without exercising the right to critical engagement is equally appreciated and part of the fabric for constructive engagement, unless proved to be used for the purposes of undue defensiveness.

## 3.4 SOUTH INPUT AND PERSPECTIVES ON DE AND THE MDGS

The presentation of southern perspectives on the above has got a strange irony to it. The story of processes to get response would be much longer than the actual views from the South on DE and the MDGs. Difficulties in the efforts to solicit views from the South raised critical questions. Was wrong methods followed? Was sufficient methods applied, that just did not yield results? Anything else?

### 3.4.1 Perspectives

The results simply include the following:

- On DE in the North.
  - Know nothing about DE in the North.
  - Not involved in DE in the north.

- Am interested to know more about DE in the North.
- DE in the North is little more than northern propaganda.
- A pedagogy or pedagogies along the lines suggested in earlier discussions need to be developed.
- The MDGs
  - Know nothing about it.
  - Sceptical or suspicious about this, since it sounds more of the familiar same economic medicine from the Structural Adjustment Programs (SAP).
  - Some individuals, communities or countries may benefit from it on a small scale of practical assistance.
  - It is overall irrelevant as a programme, yet it could be or may be engaged with as far as certain topics (the goals) are concerned, but not within the overall political and economic logic of the MDGs and the dominant northern thinking on global political and economic matters.
  - It does not deal with the redistribution of wealth or the reduction of wealth.
  - It is part of the northern domination of the global political economy.
  - It will not work out. Priorities change for the powerful and this will remain a dream and the political will to ensure that they are met does not exist in the North and never has.
  - Even the agreed formula for generating income for the MDGs is underestimating the cost to meet the goals as agreed.

### 3.4.2 Methodology

The following attempts were made to get some input from the South on DE in the north and on the MDGs.

#### *The initial plan*

Initially it was thought to develop a minimalist questionnaire to be distributed as widely as possible to a list of actors in the South. The idea was to see whether we could 'tap into' the list of participants of the World Summit on Sustainable Development (WSSD), Johannesburg, November 2002. Apart from logistical and other problems related to receiving such a list, it was also clear that the concept and practice of DE in the North is not known or hardly known in the South and furthermore there is potential and real difficulties related to suspicion about DE in the North.

Also the integrity of the project could be compromised if a questionnaire on DE and the MDGs are arrived 'cold' at actors in the South. Mistrust about the effort itself may compromise the integrity of the persons from the South participating in the project. Are we (the evaluators) useful handmaidens for the North and their DE and also for the MDGs?

As a result, a more face to face encounter and process was preferred.

#### *The WSSD in Johannesburg*

An initiative was launched to see whether additional funding could be arranged to get more persons from the South to the WSSD who would be interested in discussions on DE and the MDGs, and also to arrange a side event on these matters.

A side-event was arranged on the terrain where most of the civil society groups met. In terms of the logistics, administration and the politics of this big event it is probably an achievement in itself that this side-event did take place. A small group of persons, many of whom were from the North, attended the

session. Little interest was shown by persons from the South. Neither did sufficient impressions and information arise which could be useful to this specific project's interests, in terms of the basic terms of reference for the project.

#### *WSSD follow-up with questionnaire*

A follow-up of the WSSD was launched by sending e-mails to persons who were at the WSSD (and some others) with a simple questionnaire noting that a telephonic follow-up of the questionnaire could be arranged. A person was appointed to do this work.

A copy of the questionnaire is found is attached (annex 6). The long and the short of this effort is that it yielded no response, including no response from persons from the South who were involved in the GE meeting in Maastricht. The only response was that the person who handled the process distributed the questionnaire at an Africa-wide women's network meeting in Kampala to be filled in there. The results were generically the same as the rest: Nothing to go by.

#### *The World Social Forum, Porto Alegre, Brazil, February 2003*

The next step was to see whether something could be gained from the World Social Forum, meeting in February 2003, in Porto Alegre, Brazil. This effort yielded the same. The MDGs are not part of mainstream of critical civil society thinking or discourse in the South.

#### *Scanning of documents*

A range of documents from the South were scanned to see whether any value could be extracted in terms of the two issues of the evaluation project: DE in the North and the MDGs. The results are no different from the rest.





# PART 4: OBSERVATIONS AND CONCLUSIONS

## 4.1 EVALUATING THE PROCESS AND MANAGEMENT

### 4.1.1 Developing mandates and the terms of reference

The parameters for the evaluation were by and large set by the contracting organisation. This is certainly normal practice in most evaluation processes. With hindsight, much more discussion and consultation needed to take place with relevant stakeholders beyond the party contracted to do the evaluation but not excluding the latter.

It should be noted that an evaluation of a northern development organisation from the south implies vested interest for and from the south. The area within which these are first and foremost being played out is in connection to fundamental perspectives on the evaluation process (e.g. mandates and terms of reference) and issues related to the core business of the organisation.

The initial phase of the project therefore requires adequate attention and thorough discussion and consultation. It should be remembered that there are reasons why there is a distinction between 'the North' and the south. It is the responsibility of evaluators from the south to remind the organisation of this reality and to act in a manner that does not compromise or obscure this reality.

The openness towards change, flexibility in management and a healthy degree of mutual trust carried this particular project beyond difficulties in the project design and management. It could have turned out differently. The RORG secretariat and Steering Committee acted in an exemplary manner under the circumstances.

### 4.1.2 Oversight and independence

The integrity of a 'south evaluation' of a northern development institution will largely be determined by the extent of independence of the evaluation process.

The RORG-network, its Steering Committee and secretariat 'surrendered' control and interference in the

evaluation project beyond reasonable and agreed processes of project governance. Though the DE work is owned by the RORGs and the organisation legally owns the evaluation process, it was acknowledged that symbolically and 'politically' (i.e. in terms of North-South politics) the project is a Southern project and should be seen and respected as such. The officials 'stepped back' and played very useful and trustworthy facilitating role in the process.

Once again, the position taken by RORG secretariat and Steering Group is exemplary. Clearly, it was never easy for them and was probably never meant to be the case.

### **4.1.3 Funding and finance**

Finance should not compromise the 'independence' of contractors doing a south evaluation of a northern development organisation. It is generally easy to find (and buy!) contractors who would feel and act in a submissive and uncritical manner to the organisation being evaluated. In such a case, the overall integrity of the process will inevitably be flawed and compromised and will result in nothing less than a public relations exercise. It will also tarnish and compromise the idea of a South evaluation.

Finance and funding is well acknowledged as the most obvious power tool from 'the North' towards the south. It is imperative that evaluators of the south also display sensitivity to this dynamic and not obscure the power relations represented by financial considerations in the project. Ideally leadership in the evaluation process should not come from the ranks of funding or project partners of the organisation to be evaluated. Also costing for the project should ideally be a joint undertaking by the organisation and the contractor.

Openness and mutual trust related to financial matters must be established right from the start and nurtured throughout the process. In the case of RORG, financial management of the project was left in the hands of the contractor.

The contractor had no organisational interest, e.g. being a project partner or from a partner organisation receiving funding from the RORG-network. Future South evaluation should maintain at least a significant element of this kind of 'independence'.

### **4.1.4 Preparation, orientation, participation and buy-in**

It is commonly understood that participatory processes aimed at generating at least internal stakeholder buy-in towards an evaluation process should inform and guide the processes.

Participatory evaluation is time consuming to the extent that it could create its own timeframes and eventualities beyond original project planning and costing. Preparing for and investing in dealing with surprises, albeit pleasant and unpleasant, is of utmost importance. These twists and turns may determine the ultimate value of the evaluation. Such twists and turns are to be expected not only where individuals or a team ordinarily interact with an organisation during an evaluation. It should be remembered that an evaluation of a northern development organisation from the south also means that different worlds and horizons of North and South meet in a context and dynamic that is, as yet, still unknown and unfamiliar to 'both sides'. The south is allowed into the backroom and backyard of a northern development organisation and the latter allows for such an encounter beyond the usual donor:recipient power relations.

Extensive and intensive orientation and preparation of those from the south involved in an evaluation is required. Also thorough processes to ensure commitment and full participation by the relevant stakeholders of the organisation becomes more than a generic part of an evaluation process of this

nature. Such groundwork is necessary, whilst maintaining an overall management style of openness towards unforeseen developments.

In the case of the RORG evaluation, the issues related to strategic thinking, planning and management emerged spontaneously as a matter that required priority and additional attention prior to the finalisation of the final report. Additional work was undertaken to ensure that the project develops adequate quality of momentum and buy-in from within the organisation. In this case additional attention and funding was committed to such a process by the Ministry of Foreign Affairs which made it possible for this work to ensue.

As things stand it looks as if this investment resulted in generating a suitable and enabling environment within which the final evaluation report could become an organic part of an existing process rather than facing the possibility whereby it becomes yet another expensive piece of paperwork with marginal effect if any. It could become a tool for change rather than a document for filing.

Generic as this ideal of effective change of an organisation through organisational evaluation may seem to be, it needs to be remembered that changes within northern development organisations and changes of northern development organisations are also in the subjective and material interest of the south. It should be remembered that the South is ultimately the primary stakeholder and assumed beneficiary of development work. The fact that the South is the primary stakeholder of development work (but not being in all respects, and definitely not on in overall or macro terms) the ultimate beneficiary of development work creates a scenario of natural animosity, friction, mistrust and division between North and South. The fact that development policies and practices effectively have not stopped poverty and injustice but in general or macro terms actually generated more poverty, misery and disempowerment creates a scenario in development evaluation from the South whereby it is ultimately in the interest of the South that fundamental change must take place. This is probably the one defining difference between an evaluation situated in the North towards development work and development organisations and an evaluation from the South. Hence the fact that the qualitative aspects related to fundamental issues became the focus and driving force during this evaluation.

However any hope of success in this area would require as a matter of necessity the needed buy-in from the organisation to be evaluated, in this case the RORGs.

Painful and uncomfortable as it might have been a substantial number of RORGs, the Steering Committee and the Secretariat showed courage and commitment by spontaneously and proactively starting to address fundamental issues raised during the evaluation processes. Such developments might have been hoped for but could not have been foreseen or calculated as a definitive outcome at the start of the process. The investment into internal stakeholder participation (in this case mainly members) and buy-in and ensuring substantial commitment to the issues at hand certainly are playing themselves out in these positive developments.

The processes to involve external stakeholders from the South did not yield any major visible successes. Financial and other constraints did not assist in dreaming much bigger than what was done. However, as the next section will show, significant processes were decided on and which are being put in place prior to the completion of this report.

### 4.1.5 Final position

Despite generic difficulties in the evaluation process great appreciation exist for the way in which the RORG secretariat, the Steering Group, RORG representatives in member organisations and some organisations themselves embraced the evaluation process with courage and openness. Also the way in which initiatives were taken proactively to start dealing with issues that emerged from the process creates confidence that the organisation could generate value for itself from the investment made in itself. In this respect the RORG-network and the RORG evaluation process can generally be held up as exemplary for other organisations in the north considering to be evaluated from the South.

## 4.2 OVERALL EVALUATION ON THE EFFICACY OF THE RORGS

The following issues of good merit require mentioning:

- Whereas consensus could and should be reached on overall goals for DE in future, openness and tolerance towards diversity for specific interests and campaign foci, approaches, organisational goals etc. need to be acknowledged and recognised.
- There is overall goodwill and as such a critical mass of people of goodwill toward the South in the member organisations of the RORG-network with particular reference to persons involved in the DE work. People are truly committed to do something in Norway vis-à-vis the South.
- A tremendous volume of energy and resources go into DE work in Norway. Sophisticated and extensive channels for communication have been established.
- Massive amounts of information is 'pumped out' and released to the public or certain targeted groups in a rich variety of ways.
- Lots of member organisations of networks in the RORG-network are doing work and produce masses of practices of how to get messages through to different constituencies for different occasions and at different times of the year.
- Work is being done on continental level (e.g. Africa, Latin America), sub regional level (e.g. Southern Africa), country specific levels, sector specific levels (women, environment, youth, water, land, etc), micro projects (e.g. in relation to a water pump for a village in country X), manageable outcome projects such as exchange programmes of regular numbers of persons per year, financial assistance (to organisations for survival and doing work). The information on all of this comes back to Norway to different constituencies by different organisations.
- Interesting work is being done to broaden people's horizons vis-à-vis the South and the struggles in and by the South.
- Interesting and challenging narrative evidence regarding the positive impact on people in Norway exist and have been presented.

In addition to questions and concerns raised in earlier discussion on content and strategy the following questions remain:

- Is it necessary or even possible to develop a common basic agenda for DE whilst acknowledging, accommodating and tolerating variety and differences in approach, methods, constancies or target groups or even ideological and political differences?
- Is it desired and possible to have a sustained presence by and influence of the South in DE organisations and DE projects in general, compared to the permanent presence of the north or 'partners' (funders) in the north in the organisational life of societies and organisations in the South?
- Why is it that some organisations have the luxury to decide not to bother about the broader picture and critical issues affecting the South and their partners? The majority of people in the

South do not have such luxuries. These raise further questions:

- Are the partners in the South interested in the broader issues beyond clapping hands to the hands that feed them to survive etc.?
- Are the partners in the South empowered to raise questions on own accord?
- Is the quality of relationship of such a nature that partners dare ask questions?
- Are the fundamental differences between north and south not perhaps reduced to cultural and geographic and historical differences which merely need to be accommodated in a liberal tolerance for differences including differences in opinion which merely need to be noted and lived with and understood as natural though interesting differences?
- What are the contextual factors in Norway which might stand in the way of moving DE work (in general!) in a different and deeper and more challenging dimension which will benefit the South more and also ensure a permanent place and role for the South in DE?
- Are the members/organisations taking the RORG-network seriously as a network and the potential which such a network could offer to DE in Norway at a national level?

#### *Final position*

Regardless of the quantity of work being done and the quality of intent the very strong notion cannot be avoided namely that overall efficacy of the DE by RORG-network is questionable. This position is reached in the absence of comprehensive quantitative data. However the seriousness of not impressing on fundamental questions as indicators for and benchmarks toward efficacy of DE work as viewed from the South, coupled with individual and mutual admissions that the RORGs has not met these requirements, provides sufficient grounds to present this notion with confidence. It should be noted that this is not an absolute conclusion, given the absence of more and comprehensive rigorous quantitative data, or as one RORG representative amply put it: to come to a conclusion based on a mission impossible.

### **4.3 THE USEFULNESS OF THE MDGS FOR DE**

The usefulness of the MDGs for DE or the lack thereof is suggested to be:

- It does provide a framework to address certain thematic issues as per the statement of the different goals.
- It may hold limited value to ensure that people know the detail of the whole programme.
- Civil society, both in the South and in the North will have to take cognisance of the fact that the MDGs as a programme is a reality and will affect for the foreseeable future, i.e. till 2015, the reality in which people in South live. It is not designed to affect life in the North.
- Clear programmes for monitoring and evaluation on pragmatic level need to be supported and the results communicated through DE to the public in the North and in this case to the public in Norway.
- To challenge and unmask the basic and internal logic and morality of the MDGs. It is not aimed at promoting socio-economic justice and equity. Policies, including that of the Norwegian government must therefore be seriously challenged through DE projects as well.



## PART 5: RECOMMENDATIONS

*It is recommended:*

- That the Steering Group and Secretariat of the RORG-network be mandated to ensure that the overall efficacy of DE by the member organisations be improved by, but not limited to:
  - Embarking on a comprehensive and well managed strategic planning and management process for the RORGs as a network, including cooperation with or working in conjunction with appointed actors from the South;
  - Encouraging and seriously advising individual member organisations to conduct extensive and intensive as possible strategic thinking and planning and strategic management processes at least on the DE work and the priority of such processes in the respective organisations, including cooperation with or working in conjunction with appointed actors from the South;
  - Ensuring that the capacity of the secretariat is in line with strategic and other requirements and needs for improved efficacy of the RORG-network;
  - Assisting member organisations on strategic management issues including but not limited to capacity building for their DE work and the strategic management thereof;
  - Ensuring an annual peer review of and reporting by members to the RORG-network on strategic progress and problems: and
  - Reviewing the statutes / constitution of the RORG-network for consideration by the membership, to ensure that matters arising from the South evaluation be formally entrenched in these documents. This should include, but not be limited to:
    - Ensuring that the vision and mission of the RORG-network be amended if required;
    - Ensuring that the functioning of the network is in keeping with recent developments; and
    - Ensuring a formal and permanent presence as well as a prominent and active role of actors from the South in the structures and life of the RORG-network.
- That the RORG-network, through its Steering Group and Secretariat, takes initiatives towards improving the overall efficacy of DE in Norway by entering into a process or processes of consultation and interaction,
  - in Norway, with member organisations (as part of process envisaged in recommendation 1), other organs of civil society in Norway and other role players in Norway
  - outside Norway, with role players in Europe and North America and also role players the South,
- That a broad ranging dynamic and strategy for dealing with DE in Norway is developed.

- That the Steering Group of the RORG-network facilitates a process of critical engagement with the MDGs, as part of its DE work, amongst member organisations and the RORG-Network as an organisation to assist and motivate it to act collectively and as individual members with regards to the MDGs and to ensure adequate engagement in policy development in Norway and elsewhere.
- That the RORG-network agrees to conduct another South evaluation process in 3-4 years time when the current framework agreements expire or are about to expire, with a view that a South evaluation becomes part of the organisational life of the RORG-network.

# Annex 1: Terms of reference

---

## Background

### ***The RORG-network***

The RORG-network is a network of Norwegian NGOs doing development education in Norway, with financial support from NORAD through 4-year framework agreements. A total of 25 NGOs co-operate through this network, which, according to its own regulations, should constitute a professional forum and an arena for enhancing co-ordination, co-operation, initiatives and mobilization for a widest possible range of information distribution and awareness-raising activities on north/south- and development issues in Norway.

The strategy of the RORG-network for 2003-2006 (to be approved by the annual meeting in April 2002) states i.a.

*“Through improvement and strengthening of Development Education we wish to make a contribution to the development of knowledge, engagement and commitment, among central decision makers and citizens in general, that will make it possible to reach the MDGs and find solutions to the challenges of global poverty and environmental destruction.”*

The members of the RORG-network represents a wide range of different NGOs, including adult education associations of political parties, the church of Norway, umbrella organisations of youth´ and women’s NGOs as well as aid- and solidarity organisations, with a corresponding diversity of perspectives, target groups and types of activities. Activities include seminars, publications, web-sites, participation in public debate, campaigns, field studies etc.

The RORG-network is governed by its annual meeting, adopting and approving i.a. its policies, regulations, strategy, annual plans of actions and annual reports, as well as electing its steering committee. The steering committee serves as a Board for the co-ordinator of the RORG-network. The co-ordinator (RORG-coordinator) is responsible for the day-to-day work of the network, up-dating and developing its website (Resource site on north/south issues), contacts with NORAD, Ministry of Foreign affairs etc.

### ***RORG-network rationale for project***

After a number of large UN Conferences during the 1990s - and through the UN Millennium Summit - the international community and its dominating multilateral organisations agreed on the Millennium Development Goals (MDG). These include halving, between 1990 and 2015, the proportion of people whose income is less than one dollar a day.

The RORG-network wish to stimulate debate and discussion among and within its member organisations on how best development education in the North can constructively contribute towards reaching the MDG. Given the northern dominance in areas such as global politics, economics, news reporting, and research, the members of the RORG-network have long argued that development education in the North has to reflect the perceptions and perspectives on current global issues in both the south and the north. Such a process is aimed at promoting global understanding and dialogue between the North and South.

The RORG-network have commissioned this evaluation - with financial support from NORAD - in order to get input and advice from southern NGOs and networks, to stimulate debate on and improve the Development Education (DE) activities carried out within the RORG-network in Norway in particular as well as by northern NGOs in general. The focus will be the MDGs as set by the international community.

### ***Wider interest***

Given the emphasis being put on the MDGs in development policy and praxis, a corresponding focus on



these goals within the northern DE NGO-community is anticipated during the forthcoming years. Against this background, and on the basis of general interest among northern DE-NGOs to receive input and advice from southern NGOs, strong indications exist that this particular project will also attract interest from NGOs, networks and others engaged in DE from outside Norway as well. The project will remain in touch with and consult persons within the newly established Global Education Network Europe (GENE) - initiated by the North-South Centre (of the Council of Europe) in Lisbon to ensure that such interest is maintained and served.

### **Significance**

The significance of the project is two-fold:

- An evaluation from the South of activities of the members of the RORG-network in Norway will be a historic first, and
- Southern perceptions and perspectives on the MDGs- and its implications for DE in the north - will be presented as a basis for discussion and debate and planning for the future.

#### *Notes:*

The RORG-network and VDM Consultancy are aware that there are different voices in the South albeit ideological, political etc. The basis for the Southern perspectives is the generally shared 'discomfort' and frustration in the South about the fact that analyses perspectives and suggestion from that context is often not heard, let alone understood. Attempts will be made to ensure that authenticity be reached is the Southern perspectives presented in the report.

The process is designed to invite as wide as possible input from individuals, organisations and networks from the South. Room is allowed for differences of analyses, perspectives, and strategic inputs and will be accounted for in the final report. The selection and participation of Southern perspectives will be based on participation in the WSSD process.

The evaluation will be done in such a way as to utilise the WSSD process as far as possible e.g. the Millennium Development Goals (MDGs) will be the substantive issue round which the methodology and process of the evaluation will be pursued, processes prior, during and after the summit will be utilised to enrich the evaluation in particular to solicit the viewpoints of Southern NGOs and other institutions/players in the South (e.g. governments and/or intergovernmental bodies) and to assist RORG in its internal evaluation and future planning.

### **Outcomes**

#### ***Southern perspectives on the MDGs***

Presentation of an assessment by southern perspectives - as seen by major southern NGOs, networks and others engaged in global development issues - on the MDGs and its implications for DE in the north.

#### ***Evaluation of the RORG-network's DE-activities from the South***

Evaluation of the DE-activities of the RORG-network - from a southern perspective - as contributions to the realisation of the MDGs. The analyses, conclusions and recommendations of an evaluation team will be presented in a report to the RORG-network for improvement and follow-up. The report will include an assessment of the MDGs and DE from southern perspectives.

#### **Evaluation components and process:**

1. Data will be collected from RORG members regarding the DE work they are doing.
2. All members of RORG network will receive a basic questionnaire, which will include a focus on the MDGs, to be filled in and data processed.

3. A questionnaire will be sent out to organisations of civil society in the South involved in the WSSD process.
4. A preliminary report presenting the initial findings will be developed.
5. A workshop or seminar is envisaged in Norway during June to discuss the outcomes of the report with some representatives of significant Southern NGOs.
6. A consolidated first draft report will be presented / sent to stakeholders for comment. These stakeholders will include the RORG network, individuals and organisations in Norway with an interest in DE outside the RORG network, individuals and organisations involved in DE outside Norway (e.g. GENE), and a wide as possible input from individuals and organisations in the South.  
A reference group will be established in the South and these will receive the document. All attempts will be made to have interaction with and response from a wider group (i.e. geographic spread and organisational spread) in the South. Different avenues will be explored including formal correspondence, submissions and break away groups at different meetings where representatives from South organisations will be meeting, particularly at meetings focussing on the WSSD process.
7. Based on the response, a second draft will be developed. A next round of consultations will be held with a variety of groups inside and outside RORG as above, with a particular view to discuss it with civil society organisations in the South during the WSSD in Johannesburg in September and other opportunities that may arise (e.g. the COE congress in Maastricht) after the WSSD and prior to the finalisation of the report by the end of the year.
8. The evaluation team will visit Norway after the WSSD for in-depth interviews to be held with a selection of RORG organisations. The selection will be based on samples of organisations in terms of certain themes and organisational foci. In-depth interviews will also be held with significant individuals identified.
9. A final report will be presented to RORG not later than end December 2002. It is envisaged that the final report will contain Addenda as further elaboration on targeted issues.
10. A public launch of the report February 2003.

## **Project management, structure, accountability**

### ***Preferred criteria for composition of project actors***

- Proper representation from the South (Africa, Latin America, Asia)
- Gender representativity
- Competency in terms of substance and methodology

### ***Structure and Management***

- The RORG Steering committee and Secretariat accepts overall managerial responsibility for the process.
- Oversight is exercised by the RORG secretariat. The RORG Coordinator is ex officio member of facilitation teams.
- A Project Coordinator is appointed to facilitate, execute, oversee and co-ordinate the process. VDM Consultancy from South Africa was appointed to execute the evaluation in terms of an agreement between RORG and VDM Consultancy. In terms of this agreement Dr. Stiaan van der Merwe is the project co-ordinator.
- A Project Reference Group will be established by VDM Consultancy to work with the co-ordinator consisting of four persons i.e. the Co-ordinator, two senior persons from the South and one person from Norway (the Norwegian support group).

- An Evaluation Team. VDM Consultancy will appoint an evaluation team, consisting of the Coordinator and two others to gather basic data, do interviews and draft first report. The persons involved in the evaluation are not necessarily part of project management team. It is advisable that the project management team also be the evaluation team.
- A Southern Reference Group will be appointed by VDM Consultancy to act as a sound board and provide advice to the process. These are persons in their own right or representatives from organisations and institutions whose opinion and advice will be solicited from time to time.
- A Support Structure in Norway will be established by VDM Consultancy in Norway and could be tasked to read Norwegian material from the RORG organisations, summarise it and where necessary prepare translations, make contextual assessments.
- Individuals within the GENE-network (Global Education Network Europe - established at the initiative of the North-South Centre in Lisbon) that agreed to be consulted informally.

## Annex 2: List of institutions and organisations consulted

---

- **African Women's Economic Policy Network (AWEPON)**, Uganda  
Responses to questionnaire from participants during continental meeting
- **Development Assistance Group of European Union Workshop on Partners in Development Evaluation**, Paris, March 2003  
Formal and informal discussions with participants in general and interaction with participants during and after workshop where the RORG South Evaluation project was presented.
- **Diakonhjemmet**, Oslo Norway  
Informal meetings with persons having been involved in DE and DE activities in the past including being involved in previous RORG evaluation
- **Ecumenical Service for Socio-Economic Transformation (ESSET)**, South Africa  
Assisting with WSSD follow up
- **European Centre for Development Policy Management (ECDPM)**, Maastricht, Netherlands  
Interaction with representatives in publishing article on RORG's South Evaluation project
- **Europe-wide Congress on Global Education (EWCGE)**, Maastricht, Netherlands, Nov.2002  
Formal and informal interaction with organisers, participants from Europe and the participants invited from the South.
- **International South Group Network**, Manila, Philippines  
Formal and informal meetings and discussions with representatives from Latin America, Africa and Asia
- **NORAD**, Oslo, Norway  
Meeting representatives during formal and informal meetings
- **North South Centre**, Lisbon, Portugal  
Formal and informal discussions with representatives
- **Norwegian Ministry of Foreign Affairs**, Oslo, Norway  
Meeting with representatives during formal and informal meetings and discussions
- **RORG member organisations**, Oslo, Norway  
Individual organizational meetings with representatives and joint meetings
- **RORG Secretariat**, Oslo, Norway  
Formal and informal meetings, telephonic and e-mail discussions
- **RORG Steering Group**, Oslo, Norway  
Formal meetings discussing developments and progress
- **Third World Network (Africa)**, Ghana  
Formal and informal discussions with representatives from Africa
- **World Social Forum**, Porto Alegre, Brazil, January 2002.  
Informal discussions with participants and representatives of organisations and networks from the South (Africa, Latin America and Asia)
- **World Summit on Sustainable Development (WSSD)**, Johannesburg, South Africa, Sept. 2002.  
Formal and informal discussions with participants and workshop participants on Development Education

**Note:** Discussions with persons and organisations from the South were unstructured, given the fact that DE in the North is almost without exception unknown to role players in the South. Furthermore, discussions were influenced by serious levels of scepticism and suspicion on the agenda of DE in the North.

## Annex 3: Biographic details on the South Reference Group

---

### **Stiaan van der Merwe**

Stiaan van der Merwe is from South Africa and currently works on a freelance basis as a consultant in areas of management, governance and organisational ethics. His work involves him in public sector, private sector and in organs of civil society.

Previously he lectured in Theology in Zambia (1981-1992) and was also involved in the churches' struggle against apartheid. He then moved back to South Africa as Research Co-ordinator at the Institute for Contextual Theology (1993-1995) and worked for a year as policy researcher with the Ecumenical Advice Bureau of Drs. Beyers Naude and Wolfram Kistner. In 1997 he became the founding CEO of Transparency South Africa, the national chapter of the Berlin-based international anti-corruption network, Transparency International. He is a founding member of a number of organisations and forums including The Ecumenical Service for Socio-Economic Transformation, The Accountability Institute of South Africa, the National Anti-Corruption Forum, the International Initiative on Corruption and Governance. He is also an executive committee member of the National Consumers Forum.

Stiaan van der Merwe holds degrees in humanities (BA, BA Hons, MA), Theology (B.Th, D.Th) and management (MM) and has studied at the Universities of Stellenbosch, Western Cape and the Witwatersrand all in South Africa.

### **Naty Bernardino**

Naty Bernardino is from the Philippines and currently works as a senior researcher at the Resource Centre for People's Development (RCPD) and as member of the international secretariat of the International South Group Network (ISGN). She is also the coordinator of the ISGN Women and Globalization initiative, a tri-continental women's program in Asia, Africa and Latin America that seeks to build a network of women activists in the advocacy of feminist and development issues from the perspective of women workers, peasants and other marginalized sectors in the South.

Her political involvement started as a student activist during the martial law years in the Philippines, when she went underground and joined the people's movement against the Marcos dictatorship. Upon the ouster of Marcos, she worked "above ground" as Deputy Secretary General of the Peasant Movement of the Philippines for ten years and later as Secretary General of the Movement for National Democracy until 1999. She has done studies on trade and agriculture, economic globalization and impact on women in the South, among others. Naty Bernardino finished a college degree on Development Studies at the University of the Philippines. She is a well-known as speaker, organiser and manager of a number of international forums.

### **Alejandro Bendaña**

Alejandro Bendaña is the founder of the Centro de Estudios Internacionales (CEI) in Managua, Nicaragua. He holds a Ph.D. in History from Harvard University. During the Sandinista Government in Nicaragua (1979-1990) he served as Ambassador to the United Nations, Director General of Multilateral Affairs, Secretary General of the Foreign Ministry and external media spokesperson. In 1993, Dr. Bendaña was Visiting Professor of History at the University of Chicago and in 1996 in the Conflict Transformation Program of Eastern Mennonite University.

He also teaches at the Universidad Nacional Autónoma de Nicaragua. As the author of several books on international relations and post war reconstruction, Mr. Bendaña has served as consultant for the UNESCO Culture of Peace Program and for excombatant reintegration in Central America, Colombia and Southern Africa. In Nicaragua he worked with the Education and Action for Peace Program conducted by CEI for community leaders and demobilized soldiers. He is a member of the Nicaragua Jubilee initiative and a member of the International Coordinating of the International South Group Network, and coordinator of ISGN's Jubilee 2000 South-South initiative.

## Annex 4: List of member organisations in the RORG-network 2002

---

1. Arbeidernes opplysningsforbund - Workers Adult Education Association
2. Atlas-alliansen - The Atlas Alliance
3. CARE Norge - CARE Norway
4. Fellesrådet for Afrika - The Norwegian Council for Africa
5. Folkehøgskolerådet - Folk High School Council
6. Forum for kvinner og utviklingsspørsmål - Forum for woman and development
7. FORUT - Campaign for development and solidarity
8. Framtiden i våre hender - The Future in our hands
9. Frikirkenes Globale Info - The Evangelical Lutheran Free Church of Norway
10. Global.no (Norwegian North/South Internet Portal)
11. Høyres Studieforbund - Adult Education Association of the Conservative Party
12. Idégruppen om Nord/Sør - The North/South Coalition
13. Kirkens u-landsinformasjon - Development Education of Church of Norway
14. Kristelig Folkepartis Studieforbund - The Adult Education Association of the Christian Democratic Party
15. Latin-Amerikagruppene i Norge - The Latin America Groups in Norway
16. Landsrådet for Norges barne- og ungdomsorganisasjoner - The Norwegian Youth Council
17. Operasjon Dagsverk - Operation a-days-work
18. Regnskogsfondet - The Rainforest Foundation
19. Senterpartiets Studieforbund - The Adult Education Association of the Center Party
20. Selskapet for Norges Vel - The Royal Norwegian Society for Development
21. Sosialistisk Opplysningsforbund - The Socialist Association for Adult Education
22. Strømmestiftelsen - The Stromme Foundation
23. Studentenes og akademikernes internasjonale hjelpefond - The International Assistance Fund of Students and Academics
24. Studieforbundet for Folkeopplysning - The Study Association for Peoples Education
25. Utviklingsfondet - The Development Fund
26. Vennskap Nord/Sør - Friendship North/South

## Annex 5: Questionnaire for the RORGs

---

*How does your organisation understand the purpose of Development Education (DE, i.e. opplysningsarbeid om nord/sør- og utviklingsspørsmål)*

“ *In the North in general*

“ *In Norway*

*What kind of DE goals did you set for yourself over the past five years?*

*Were there any significant changes in the way you understand DE, which caused your organisation to change its goals for DE?*

*Did you meet your overall goals over the past five years?*

*How did your organisation interact with the South during the last five years?*

*What was the impact of this interaction on your organisation in terms of its understanding of DE and the message to Norway or your constituency?*

*Was there any significant feedback from your constituency on your message in relation to the South?*

*What role does the Millennium Development Goals (MDG) play in your current and planned DE activities?*

*Does your organisation focus on any specific area of the MDGs.*

*Are there any reasons for you to feel that you cannot raise certain issues in DE work (e.g. if government provide funding for your organisation, does that inhibit you to say certain things or to raise certain issues which may be critical to government; or your constituency does not like the message or is not 'ready' for certain information)?*

*What do you think will be common or general trends in views from the South on the MDGs and what do you think will be the rationale thereof?*

*How will you react if the anticipated views from the South are different from your own?*

*Are there any questions you like to ask to people and organisations in the South on:*

- *DE in the North,*
- *Your work,*
- *DE work in Norway?*

*Does your organisation have any significant documents (statements, declarations, etc.) from organisations in the South which may assist the evaluation process? Do you know of any such documents but do not have them at hand? Please mention these. Would you kindly forward such documents or indicate where it could be accessed, to form part of the process documentation?*

## Annex 6: Questionnaire for NGOs in the South

---

*How do you or how does your organisation relate to DE in North?*

- Know nothing about it
- Irrelevant to us
- Know little about it
- Know a lot about it
- Involved in DE in the north
- Important to us
- Interested in DE in the north
- Other (type here)

*What should be the purpose of DE in the North?*

- Changes in attitudes towards south
- Solidarity with South
- Fund raising
- Policy changes favourable to South
- Fundamentally challenge globalisation
- Information and awareness about the South
- Information on projects and project partners
- Promote northern government policies
- Critical engagement on issues concerning the South
- Provide the South authentic voice and space in the North.
- Other (type here)

*Should DE in the North be guided by a basic pedagogy (e.g. a pedagogy for the rich, powerful and comfortable)?*

- Basic pedagogy not needed
- Basic pedagogy necessary
- Example is irrelevant
- Example sounds interesting
- Example is the right direction
- Other possible theme/approach for a pedagogy (Type here)

*What is your / your organisations view on the Millennium Development Goals (MDGs) especially after the **WSSD** in Johannesburg August - September 2002?*

- Very positive
- Overall positive with some criticism on practicalities
- Some positive aspects but overall negative on ideological and practical levels
- Reject it on ideological and practical levels.
- Other(type here)

*How should the MGDs be addressed and dealt with in DE in the North.*

- As promotion of the MDGs
- To get buy in from business and society
- As a tool for critical engagement with societies
- As an example of northern domination and arrogance over the South
- Other (type here)



*Is there a role for the South in DE in the North?*

- No
- Yes

*If any, what role should the South (organisations, movements, individuals, project partners etc) play in DE in the North?*

- Equal partners in planning, implementation and evaluation
- References for advice
- Other (Type here)

*Any additional remarks or questions?*

## Annex 7: Process components and management

---

The process and the management of the project had in itself an impact on the content of the evaluation. This seemingly technical and formal process-related part of the report reflects in itself a learning process in North-South and South-North relations and issues. As such the presentation of this aspect or dimension of the evaluation process is hoped to form a basis for lessons and recommendations related to future South evaluations of the RORG-network. It may also hold lessons for similar attempts in other development and development related organisations in the North.

The following basic aspects of the project were initially envisaged.

- Phase one: Planning and developing mandate(-s), terms of reference and management structures
- Phase two: Internal evaluation processes in the RORG-Network
- Phase three: Soliciting inputs from the South
- Phase four: Consolidation and final reporting

Unexpected and unplanned developments on a basic level resulted in the following:

- Financial and other constraints, resulting from changes that took place in the planning phase (phase one), enforced a smaller than envisaged Project Reference Group as well as a reduced fieldwork group in doing the fieldwork of the internal evaluation (Phase two). The Project Coordinator did most of the field work for the evaluation.
- Phases two and three were initially planned to run concurrently and envisaged that the results of these phases would jointly feed into the processes of consolidation of insights and change processes.
- The basic design for the process of consolidation (phase four) was changed when a need for thorough strategic planning and thinking to be part of the process of evaluation was requested by the RORGs during the internal evaluation (phase two). This meant that the structure and nature of the consolidation process was altered in the sense that it was both broadened and deepened. It also called for additional funding and became effective when additional funds were availed. Notably these affected both process and content in a positive sense.
- The anticipated and planned input from the South did not nearly materialise in terms of earlier expectations. These developments led to the following:
  - The timeframes for the completion of the south input had to be stretched till very late in the consolidation and reporting phase (phase four).
  - Additional funding had to be raised to ensure that at least an attempt at being as comprehensive and thorough as possible could be put in place.
  - Having secured additional funding allowed changes to take effect, however with little added value in terms of what was expected.
- The remainder of the project had to adjust to accommodate and assimilate all these changes.

The basic material for the main findings was generated from the following events.

- A questionnaire sent out to the different member organizations (April 2002);
- Processing and analysing responses (April/May 2002);
- More in-depth discussion of responses with RORG representatives of individual RORGs (June 2002);
- A follow-up roundtable discussion with the RORGs on the outcomes of the questionnaire and field trip (June 2002);
- A Work-in-Progress Report (WIP report) and responses to it (August 2002);
- A second round of discussions with organisations around strategic management issues, in most cases with broader and different participation beyond that of the RORG representatives in

- organisations (October/November 2002);
- A joint two-day seminar related to content and strategic management (February 2003);

The material and insights developed on content and strategic issues through each of these events and processes will be discussed. The discussions on these matters hold important implications for DE in Norway by the RORGs, Norway in general and other regions in the North as well.

The significance of the questionnaire and the responses is that these provided a set of first impressions on issues relevant to a/south evaluation on the efficacy of DE work by the RORG-Network. As such these first impressions became lasting issues in the sense that they not only developed into becoming 'benchmarks' for this evaluation, but also determining the core issues to be dealt with in follow-up action.

Some reflections on the questionnaire include:

- The questions (see annex 5 and 6), as developed by participants from the South, were not based on expertise in the field of DE prior to the project. In fact, they knew little if anything of the subject matter. The project process became a way of learning what DE in the North is all about.
- The questions are by and large generic and dipstick questions in order to gain a 'global weather report' on the situation within the RORG-network on DE. The questions related to the MDGs were included as agreed at the AGM as special test case material.
- 20 responses were received representing 76% of the 26 member organisations of the RORG-Network (see annex 4), whilst noting that circumstances in some member organisations did not enable them to respond. A small percentage did not provide any reason for not responding.

Comments, evaluation and way forward:

- The quality of responses was generally good and very informative. In some cases the quality of the responses were affected by time and other constraints associated with year-end pressures, not the least the anticipation of going on holidays and some staff difficulties (e.g. the person actually responsible for the project or the person knowledgeable with the project was not available at the time).
- An interesting aspect of the responses was that in some cases member organisation's Boards or the relevant committees presented a collective response, and thereby improving the quality and legitimacy of the relevant organisations' responses.
- The subsequent interviews and other discussions assisted in filling gaps either in understanding the response or in cases where the organisation wished to add to or amend a response. Further more the interviews and joint discussions opened up aspects and dimensions for further discussions in different organisations' activities, approaches, problems and aspirations.
- In future much more time need to be spent on orientation of evaluators from the South in terms of context and substance of work.
- Consideration could be given to assess whether different theories, practices and tools for South-North stakeholder evaluations may have to be developed.

## Annex 8: The Maastricht Global Education Declaration (2002)

---

A European Strategy Framework  
For Improving and Increasing Global Education to the Year 2015  
The Maastricht Global Education Declaration  
acclaimed at the Europe-Wide Global Education Congress,  
Maastricht, 15th - 17th November 2002

We, the participating delegations of the Europe-Wide Global Education Congress, Maastricht, November 15th - 17th 2002, representing parliamentarians, governments, local and regional authorities and civil society organisations from the member states of the Council of Europe, desiring to contribute to the follow-up of the World Summit on Sustainable Development and to the preparations for the United Nations' Decade for Education for Sustainable Development.

### **1. Recalling:**

- International commitments to global sustainable development made at the recent World Summit on Sustainable Development, and to the development of a global partnership for the reduction of global poverty as outlined in the UN Millennium Development Goals
- International, regional and national commitments to increase and improve support for global education, as education that supports peoples' search for knowledge about the realities of their world, and engages them in critical global citizenship towards greater sustainability, equity and human rights for all (See Appendix 1).
- The Council of Europe's North-South Centre definitions of Global Education (2002)
  - Global Education is education that opens people's eyes and mind to the realities of the world, and wakens them to bring about a world of greater justice, equity and human rights for all.
  - Global Education is understood to encompass Development Education, Human Rights Education, Education for Sustainability, Education for Peace and Conflict Prevention and Intercultural Education; being the global dimensions of Education for Citizenship.

### **2. Profoundly aware of the fact that**

- vast global inequalities persist and basic human needs, including the right to education (as mentioned in the Dakaar declaration of October 2001), are not yet met for all people;
- democratic decision processes must rest on a political dialogue between informed and empowered citizens and their elected representatives;
- the fundamental transformations of production and consumption patterns required to achieve sustainable development can only be realised if citizens, women and men alike, have access to adequate information and understand and agree to the necessity to act;
- well conceived and strategically planned Global Education, which also takes account of gender issues, should contribute to understanding and acceptance of such measures.

### **3. Recognising that**

- Europe is a continent whose peoples are drawn from and are present in all areas of the world.
- We live in an increasingly globalised world where trans-border problems must be met by joint, multilateral political measures.
- Challenges to international solidarity must be met with firm resolve.
- Global Education is essential for strengthening public support for spending on development

co-operation. All citizens need knowledge and skills to understand, participate in and interact with our global society as empowered global citizens. This poses fundamental challenges for all areas of life including education.

- There are fresh challenges and opportunities to engage Europeans in forms of education for active local, national and global citizenship and for sustainable lifestyles in order to counteract loss of public confidence in governance, including national and international institutions.
- All citizens need knowledge and skills to understand, participate in and interact critically with our global society
- The methodology of Global Education focuses on supporting active learning and encouraging reflection with active participation of learners and educators. It celebrates and promotes diversity and respect for others and encourages learners to make their choices in their own context in relation to the global context.

#### **4. Agreeing that...**

A world that is just, peaceful and sustainable is in the interest of all.

Since the definitions of Global Education above include the concept of Education for Sustainable Development, this Strategy can be included in follow-up to the recent World Summit on Sustainable Development and serve as a preparation for the UN decade for Education for Sustainable Development starting in 2005.

Global Education being a cross-sectoral obligation can significantly contribute to achieving these commitments. Access to Global Education is both a necessity and a right. This will require:

- Increased and improved co-operation and co-ordination between international, national, regional and local level actors.
- The active participation and commitment in the follow-up of this Congress of all four categories of political actors - parliamentarians, governments, local and regional authorities as well as civil society (the quadrilogue) which are involved in the on-going and useful political discussion in the framework of the North-South Centre.
- It is vital to ensure the active participation in the follow-up to this Congress of all four categories of political actors - parliamentarians, governments, local and regional authorities as well as civil society - which are involved in the on-going useful political discussion - the quadrilogue - in the framework of the North-South Centre.
- Significantly increased additional funding, on national and international levels.
- Increased support across Ministries of Development Co-operation, Foreign Affairs, Trade, Environment and particularly Ministries of Education to ensure full integration into curricula of formal and non-formal education at all levels.
- International, national, regional and local support and co-ordination mechanisms.
- Co-operation between North and South and between East and West needs to be greatly increased.

#### **5. Wish to commit ourselves, and the member states, civil society organisations, parliamentary structures and local and regional authorities that we represent to....**

5.1 To take forward the process of defining Global Education and ensuring that a rich diversity of experience and perspectives (e.g. Southern, Minorities, Youth and Women's perspectives) is included

at every stage.

5.2 Develop, in cooperation with the competent authorities and relevant actors, (or build on existing), national action plans, starting now and to 2015, for increased and improved Global Education towards the target date of the Millennium Development Goals.

5.3 Increase funding for Global Education,

5.4 Secure the integration of Global Education perspectives into education systems at all levels.

5.5 Develop, or where developed, improve and increase national structures for funding, support, co-ordination and policy-making in global education in all Council of Europe member states, as appropriate to national conditions.

5.6 Develop, or where developed, improve strategies for raising and assuring the quality of Global Education.

5.7 Increase support for Regional, European, and international networking of strategies for increased and improved Global Education; between policymakers and practitioners.

5.8 Test the feasibility of developing a peer monitoring/peer support programme, through national Global Education Reports, perhaps along the lines of the DAC peer reviews, in a 12 year frame.

5.9 To contribute to the follow-up to the World Summit on Sustainable Development and to the preparations for the United Nations Decade for Education for Sustainable Development.

We, the participating delegations of the Europe-wide Global Education Congress, Maastricht, November 15th - 17th 2002, representing parliamentarians, governments, local and regional authorities and civil society organisations from the member states of the Council of Europe, commit ourselves to an on-going dialogue with the South about the form and content on Global Education.

## **Annex 9: Statement to Europe-wide Global Education Congress by Invitees from the South**

---

adopted by southern participants  
at the Europe-Wide Global Education Congress,  
Maastricht, 15th - 17th November 2002

### **1. Preamble**

1.1. We, the invitees from the South, wish to record our appreciation for being invited to this Congress and the benefits to us of exposue, networking and inking with other partners.

1.2. We are, however, concerned that our countries are materially affected by the outcomes of this Congress and the manner that Europe understands and implements Global Education and we wish this to be noted and understood.

1.3. We also record our consensus support for the withdrawel of South members from the Drafting Team and we have instead agreed to produce this statement as a constructive input.

1.4. This statement is made in our personal capacity to serve as points of departure for future properly constituted debate on Global Education by relevant global organizations and processes.

1.5. We request interactive discussion on this statement on the final day of the Congress.

### **2. Our concern about the conference is as follows:**

There has been insufficient analysis in the conceptualising and problematising Global Education, from a global and specifically a Southern persepective, resulting in inadequate contextualisation of the global crisis.

### **3. Recommendations:**

3.1. As a point of departure, we believe that Global Education should be understood as a process of collective learning about responding to global problems and issues, in which all relevant actors are equal partners.

3.2. Global education should be guided by a clear analysis of the global crisis.

3.3. In this perspective, we believe that a properly constituted partnership process to define and develop Global Education should be put in place.

November 2002



*Wisdom*  
*Justice*  
*Integrity*

# **vdm** **consultancy**

MANAGEMENT, GOVERNANCE AND ETHICS SERVICES

185 Beauval Avenue  
Mondeor, 2091 South Africa

+27 (0)11 680 8621

+27 (0)11 680 8621

+27 (0)82 5746 201

[vdm@sn.apc.org](mailto:vdm@sn.apc.org)

## **The RORG-network**

Storgt. 11, 0155 Oslo

Norway

+47 23 01 03 20

+47 23 01 03 01

e-mail: [rorg@rorg.no](mailto:rorg@rorg.no)

web: <http://www.rorg.no>