EXTERNAL EVALUATION

INDIAN SOCIAL INSTITUTE - TRAINING CENTRE
BANGALORE

AUGUST - SEPTEMBER 1992

REBECCA KATTICAREN
THELMA NARAYAN
SHOBHA RAGHURAM

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3/7/92

To   September 29, 1992

Rev.Fr.Sebasti Raj, S.J
Director and Secretary to the Governing Body
Indian Social Institute
10, Institutional Area
Lodi Road
New Delhi - 110 003

Subject: External Evaluation - Indian Social Institute-Training
            Centre, Bangalore
Reference: Your letter dated July 29, 1992, No.ISI/TC/92

Dear Fr.Sebasti Raj,

I have the pleasure of presenting to you the Report of the External
Evaluation for your study and follow up action.

Personally and on behalf of my colleagues, I would like to thank you and
Fr.Dominic George for giving us this opportunity to interact closely with
you and your colleagues both of Delhi and Bangalore.

As per the norms of Evaluation, I would send a copy of the report to
Rev.Fr.Dominic George, Director, ISI-TC, Bangalore.

With warm regards,

Yours sincerely,

(Rebecca Katticaren)
      Convenor
 Evaluation Team

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FOREWORD

During my stay with ISI-TC, Bangalore in the month of July 1992, Rev.Fr.Dominic George, requested me to take up this assignment of doing an evaluation of ISI-TC, Bangalore and to function as its coordinator and convenor of the External Evaluation Committee. It was with slight apprehension that I agreed. Staying on the campus for a month, during the evaluation, had its own advantages and disadvantages. Still I should admit that the whole exercise was a pleasant one for me. Thanks to Fr.Dominic and his colleagues.

My two colleagues, Dr.Thelma Narayan and Dr.Shobha Raghuram, were well selected by the ISI-TC Staff Team. Their experiences, commitment and insights on a number of issues related to the efficiency, effectiveness and the future of ISI-TC have contributed significantly to the completeness of this report.

My hope is that this report will be viewed by all concerned in a spirit of influencing improvement, and not as an offensive weapon. My colleagues and I have made a sincere effort to contribute to a process of progress and growth of the Centre.

Let me take this opportunity to thank Dr.Thelma and Dr.Shobha for their time and for the contributions they have made during interviews and in the preparation of this report. On behalf of the Evaluation Team I would like to thank Fr.Sebasti Raj and Fr.Dominic George for their support. I appreciate the efforts taken by the Administrator, Bro.Thomas D´Souza in making my stay at ISI-TC comfortable and homely. A special thanks to all the staff for helping the team to understand the dynamics of the centre, which have helped us have a perspective while preparing the recommendations in this report.

I thank the representatives of other voluntary organisations who have taken time off to give their views on the effectiveness of the centre and suggestions for it´s improvement. I sincerely hope these well wishers would use this report to influence the processes at ISI-TC and make this a centre which will influence change in society, and bring about a new social order.

The Evaluation Team wishes to place on record its gratitude for having been permitted to enter into and look at the internal reality of ISI-TC. The trust and cooperation we received are acknowledged. We trust this report is, in some measure, a token of our appreciation and our belief in the relevance and future of ISI-TC, Bangalore.

Rebecca Katticaren
Convenor
Evaluation Team

September 1992

INTRODUCTION

1   In July 1992, Fr. Dominic George, SJ, Director of ISI-TC, Bangalore, as a follow up of the resolution of ISI Governing Body of February 1992 and in consultation with ISI/TC staff team, decided to set up an external evaluation commission and invited the following three persons to take up this evaluation of ISI/TC - Bangalore:

    a.   Mrs. Rebecca Katticaren
        Community Development Specialist,
        Netherlands Assisted Projects,
        1-2-288/6/2 Gaganmahal,
        Hyderabad 500 029 (Phone 665358)

    b.   Dr. (Mrs.) Thelma Ravi Narayan,
        Community Health Cell,
        326, 5th Main, 1st Block,
        Coramanagala,
        Bangalore- 560 034 (Phone 531518)

    c.   Dr. (Mrs.) Shobha Raghuram
        HIVOS Regional Office,
        98/A Wheeler Road Extn.
        Cooke Town,
        Bangalore - 560 084 (Phone 563678)

2.   The Governing Body had actually appointed in the month October 1991 an External Evaluation Commission to evaluate ISI-TC, Bangalore and ISI-Delhi. Since there was no follow up action after the first meeting of this Commission with the Governing Body of ISI, the evaluation fell through and the Commission was disbanded. Such a Commission was acceptable to all concerned donor agencies who were looking forward to an evaluation report. Since this did not take off and because ISI-TC had begun a process of planning, and improving efficiency and effectiveness of services rendered, the Director felt it appropriate to have an external evaluation done on their own.

3.   The evaluation commission, with Rebecca as convenor and Thelma and Shoba as members, was constituted on 2 July 1992, after Fr. Dominic George ascertained the willingness and availability of the proposed team members to take up the evaluation. Along with the letter constituting the commission, the evaluation team was also provided their terms of reference. The Terms of Reference is annexed to this evaluation report.

(Annexure 1)

4.   The TOR covered the following areas:

   a.   overview the historical evolution of ISI/TC and to suggest
          guidelines for future orientation

   b.   study of the goals and objectives of ISI/TC and assess its
          impact and contributions to the social scene of India and
          South Asia

   c.   study the policy statements of 1980 and 1990 and comment on
          their adequacy and the degree to which they have been
          internalized and operationalised

   d.   study the staff culture and recommend measures for staff
          development

   e.   assess the efficiency and effectiveness of ISI/TC
          administration

   f.   overview the financial dimensions of ISI/TC, excluding salary
          structures

   The commission was to develop its own evaluation methodology in
   consultation with the ISI/TC staff team and present its report to
   the Chairman of ISI Governing Body by 15 August, 1992.

5.   Before the actual commencement of the evaluation, on July 21, 1992
   the TOR and evaluation methodology were discussed with the ISI/TC
   Staff Team. The minutes of that meeting is enclosed as an
   annexure.

   (Annexure 2)

6.   It was decided that the thrust of the evaluation would be bifocal:

   a.   an indicative assessment of the impact and effectiveness of
          the outreach and training programs, from where the ISI/TC team
          itself could take on more comprehensive follow up

   b.   a detailed study of the internal efficiency of ISI/TC,
          indicating areas for improvement and suggesting ways and means
          for this improved performance

7.   The evaluation methodology consisted essentially of unstructured,
   informal interviews/discussions, small group meetings - with staff
   members of the ISI/TC, representatives of Organisations/Agencies
   who have been and are associated with the Centre, representatives
   from ISI-Delhi, participants and resource persons who were present
   in the campus at the time of evaluation, a few persons who have
   had the opportunity to undergo training in the institute, and some
   neighbours and well wishers of ISI-TC, and also members of donor
   organisations. To supplement these primary sources of information,
   the evaluation team also referred to documents, reports, workshop
   papers, etc., relevant to the areas under evaluation.

8.   ISI/TC Staff Team had organised a very thoroughgoing evaluation cum annual planning workshop in April 1992, using the Objective Oriented Project Planning (OOPP) methodology, and pooling in resource support from external resource persons and friends of ISI/TC. The report made very interesting reading. Copies have been sent to all funding partners and to ISI/Delhi for information and comments. In the opinion of this evaluation commission, this exercise has more than set on course a process of self evaluation. This external evaluation was concerned with further exploration, starting from the perspectives and insights already gained during the OOPP workshop and subsequently documented by its moderator.

9.   Therefore, the intention of this external evaluation is to influence an ongoing process of search for greater relevance and impact. The evaluation team sincerely hopes that this report will contribute towards this objective - of enhancing the quality of services provided by ISI/TC.

10.   Limitations of this Study:

10.1   The Evaluation Team was first appointed by the Director of ISI-TC, Bangalore as noted earlier in para 1 and 2. The exercise was viewed by the team as part of an internal exercise following the OOPP workshop. Therefore the whole approach to the evaluation was informal. But just when the Evaluation team was ready with a draft of their findings and recommendations to be presented to the Staff Team of ISI-TC, Bangalore, it received a letter from Rev.Fr.Sebasti Raj redefining the nature of this exercise as an external formal one. The team was requested to keep the report confidential. As such, the evaluation team re-discussed its methodology and changed the approach to the evaluation and got the period extended to August 31, 1992 to do some additional interviews and reading up of documents.

                                                    (Annexure 3)

10.2   The members of the Evaluation Team were not able to give their full time attention to this study because of their prior commitments to their own organisations. The team members found it rather difficult to coordinate discussions and the report and had to rely a lot on the postal departments and the telephone exchanges.

10.3   The non availability of copies of the previous evaluation reports (e.g 1984), annual reports, organised list of participants/ organisations was another handicap to this study. The team was also unable to interact with participants from other states who have been using the facilities and services of the centre, due to lack of time. But the team feels there is scope for this interaction when a detailed study will be taken up by the Centre to assess the impact of their training programs, as a follow up to this evaluation.

11.   The Evaluation Team has brought to this report their own social concerns and personal interest in the future and excellence of ISI/TC. They have spent considerable time on interviews and discussions among the members which have clarified perspectives and developed the focus of this evaluation. However, the real limitations discussed above have prevented the team from being exhaustive in their study. Within the time available, the concern was with focussing on a few pertinent issues, and recommending broad areas for intervention.

12.   It is hoped, the Governing Body of ISI/TC and the Staff Team would carry forward a critique of the implications and demands of the views from a friendly and concerned "external eye", integrating them with the insights and visions of their own "inner eye".

CHAPTER 1
HISTORICAL OVERVIEW OF ISI/TC - BANGALORE

This brief historical review covers both ISI/Delhi and ISI/TC - Bangalore, as the two institutes have common root and are linked legally as well as functionally and have, in several ways and areas, influenced each other.

1.1 Initiation and Evolution of ISI/TC:

1.1.1 The Indian Social Institute was started on 6 January, 1951, in Poona by the Jesuits, with an objective "to contribute to the emergence of a new social order in post-independent India". It was a centre for Research, Publication and Training. Its Journal `Social Action´ was initiated in April 1951, and has been published continually since then.

1.1.2 In the 1950´s, it supported the development of Schools of Social Work and Personnel Management in different parts of the country. Research efforts were primarily on family and population, labour relations and rural development.

1.1.3 The ISI was shifted from Poona to New Delhi in 1963. A Family Life Centre was founded in conjunction with its work on family and population. Work on labour and industry continued, with research and training on trade unions and labour relations and with consultancy services to the labour commission of the Government of India, in a study on the criteria for minimum need based wages and the method for its computation.

1.1.4 The Extension Service was founded in Trivandrum in 1961, in an effort to translate research findings into action. The first project was to cooperate the bonded fishermen of Marianad, in Trivandrum. Subsequently, in 1965, the Extension Service was shifted to Bangalore, and to Delhi in 1986.

1.1.5 The ISI/Training Centre (ISI/TC) was founded in Bangalore in 1963 to train development workers. This direct involvement in training evolved from earlier efforts in supporting training indirectly through support to the schools of social work. The approach to training during the 1960´s was that of imparting know-how and skills in community development, cooperativisation, etc. This was the general trend in the country at that time, with the launching of the Community Development Blocks in each Taluk. The groups catered to by ISI/TC were predominantly church based, especially religious personnel.

1.1.6 During the mid 1960´s, ISI/New Delhi began to initiate Action Research on problems specific to tribal regions, the Chota Nagpur survey being an instance. It also took initiatives for the formation of `Vikas Maitri´, a group based in Ranchi - to evolve development alternatives.

1.1.7 In the early 1970´s, a Management Centre was set up within ISI/New Delhi, and it functioned for a few years. It organised seminars on partnership in economic development. The focus of research was on

tribals, women and urban poor, emphasizing collaborative research as methodology.

1.1.8 During the same period, the training content of ISI/TC shifted gradually from community development to organisation and conscientisation of people, using the concepts of Non Formal Education, based on the philosophy and methodology of Paulo Freire. The process went on through the entire decade, by when, ISI/TC was fully oriented to training in social and political analysis to understand the roots of poverty and to the need for political solutions to poverty.

1.1.9 In 1976, ISI/New Delhi started programmes for Women's Development. At the same time, a Documentation Centre was founded in Delhi to support training activities and social action groups in the field. In 1977, MOTT (Mobile Orientation and Training Team) was formed, to provide training and analysis to social activists in the field (rather than institution based) and as a support organisation to activists. Services were provided mostly to the Central and Northern Hindi speaking regions.

1.1.10 During the late 1970's, ISI/TC went further forward from a political understanding of the under-developed, and began to focus, support, develop methods for peoples' organisation along class lines.

1.1.11 In 1979, the Documentation Centre was shifted from New Delhi to ISI/TC - Bangalore. Besides supporting the training, regular despatches were sent to activists/interested people in the field.

1.1.12 1980 saw ISI/New Delhi coordinating the "All-India Action against the proposed Forest Bill". During the process, a Publication Unit also developed, bringing out low priced monographs/publications to support activists and researchers for spreading of knowledge among the weaker sections.

1.1.13 During the 1980's, ISI/New Delhi began to increase its efforts towards participatory methodologies in action and research. At ISI/TC, evolving further from political analysis and realization of the need for class organisations, the training orientation included political action and the need to "join hands with broader political forces which are more serious about the plight of the working class". This resulted in a shift in the type of people/groups making use of ISI - more secular/christian social activists began to come in, in contrast to the earlier development workers and personnel of church based NGOs/project holders. Simultaneously, ISI/TC also initiated attempts towards introducing participatory processes in its own administration/management.

1.1.14 In 1981, a Legal Aid Program was started within the Department of Training and Program for SCs in the Department of Research - both at ISI/Delhi. In 1983, the Social Action Trust was founded, and it took over responsibility for publishing three Journals: Social Action, Social Action Book Review Supplements (SABRS), and Legal News and Views.

1.1.15 All through the late 1980's, efforts at ISI/TC concentrated on developing its building infrastructure and in working towards

financial stability and greater self reliance. During 1990-92, some attention was also paid to the academic area, introducing several new courses, some in collaboration with other groups. ISI/TC infrastructural facilities began to be made available to other groups, social activists, development groups, dalit groups, women groups, NGO groups, religious groups, etc. Initiatives to make ISI/TC an autonomous institute were taken up in earnest.

1.1.16 By mid 1992, ISI/TC had the following facets to it:

- good infrastructure for organising and conducting seminars and workshops

- external groups with a wide variety of social interests and concerns, including religious groups avail of these facilities

- a wide range of training courses introduced, co-sponsored with other organisations/resource persons, including skill development in communication, organisation management, etc.

- the concept of team management introduced and being experimented with

- new academic staff recruited

- efforts towards autonomy in advanced stages

- two new cells initiated within the academic wing: legal aid and dalits

- efforts initiated towards streamlining administration and management with the team as the central point

- efforts initiated to further define/clarify goals and objectives and based on this, to redefine training and outreach

1.2   An Overview:

1.2.1   What has been discussed above does not cover the entire history of ISI-TC, but some of the important milestones, standing out in the documents made available to the evaluation team, and which the team considered as being important influencing factors in the directions the institute has and is taking. Even here no attempt has been made to discuss the processes that lead to these dynamics and of which events are only culminations.

1.2.2   Since ISI/TC has 30 years of history, it would probably be useful to document an interpretative history, including its own struggles as it worked towards creating its role. This may provide useful clues and tips to others undertaking similar journeys. This could be built up through interaction with all the previous Directors and Staff of ISI, as well as through a more detailed study of the documents and records.

1.2.3   Dialectics, changes and a restless search for meaning and relevance to the Indian situation seem to mark the history of

ISI/New Delhi since its inception at Poona in 1951, and of ISI/Training Centre - Bangalore, since 1963. There has always been an implicit and in later years a much more explicit and analytical focus on the marginalised exploited sectors of Indian society.

1.2.4   Among the factors that have influenced the growth and development of the institute are the following:

a. the dominant or prevalent schools of thought regarding development in India/Third World and internationally. This understanding underwent various stages and changes from the euphoria and enthusiasm of the early post-independent years of high expectations from the new "Democratic, Secular, Socialist Republic". It was during this period that ISI was founded. The understanding of Community Development, the experience of its essential limitations and inadequacies, developed later into a structural analysis of society from which evolved the need for social action, organisation of people and conscientisation.

b. The specific training background/experiences/ideology and even personalities of the main players involved also had their impact on the growth of the institute and the particular expressions this broad understanding of societal analysis and social action took.

c. Interaction with grass root realities, primarily through research and training activities, and to a lesser extent through direct involvement, has been an important influence.

d. The spirituality, philosophy and styles of functioning of the personnel of the Society of Jesus, to whom the Institute belongs, has been a determining factor.

1.2.5   These differing factors have resulted in dialectic tensions and confrontations, which to an outsider may appear creative, useful and perhaps inevitable. However it is only the insiders - collective and individual - that can attempt to assess their contribution towards relevant and accountable functioning.

1.2.6   Perhaps, it is also crucial that serious and vigorous efforts are made to involve the personnel and clientele of ISI/TC in such processes, so that the directions the institute take evolve out of creative interaction of several concerned persons, among themselves and with the reality of people, so that ideology becomes less elitist and personality dictated.

1.2.7   Due to the cumulation of these factors, as well as due to events that have occurred nationally and internationally, ISI/TC seems to be in a phase where the directions of its main thrust appear to be blunted. There could be a more active process of debate both within the staff, as well as in consultation with old participants and partners, and also with wider like minded groups to arrive at a collective consensus as to its basic philosophy, future directions, training and research needs, content, methodology, etc.

1.2.8   It is also important to accept the ground reality that the institute is owned and managed by the Jesuits through the Governing Body and the Provincial of India, and that it is situated within the Catholic Church in India. These realities open up possibilities as well as limitations and constraints, which must be realistically appreciated. Nonetheless, even in this particular sphere, ISI/TC appears to have been one of the forerunners in introducing analytical social thought and praxis in the Indian Church. This in itself is a significant contribution. In various parts of the country, there are people - religious and lay - who have been challenged to question and move away from an institutional approach. ISI's attempt to be secular within its religious parametres, is truly commendable.

1.2.9   On surveying the Annual Report of 1990, and the programmes for 1991 and 1992, there is no doubt that the initiatives and thrust of the institute have been progressive indeed. Given its location in a city like Bangalore with its extremely lethargic social climate, ISI/TC is certainly an institute with a difference. The university here today is virtually silent on most issues of political and social importance. With the exception of the Institute for Social and Economic Change (ISEC), there is no institute or training centre that could boast about a wide range of programmes, seminars and talks that really serve those involved in the NGO sector.

1.2.10 Given a climate of abysmal indifference to issues that concern the marginalised, and ISI being quite isolated, it will suffer from lack of sufficient peer review. ISI/TC will, therefore, need to identify and involve a wider community that will constantly be critical of its role and its services in a constructive way, so that it will improve consistently and never become complacent and thus of reduced relevance. It may require greater collaboration with other NGO training groups like FEVORD-K, and many others based elsewhere in the South. It will need to invite faculty and resource persons from institutes like ISEC, to review the content and methodology of its programmes. These suggestions come because ISI/TC, in the view of the Evaluation Team, should continue to perform a very important role in informing and developing the NGO culture, in updating and most important of all in providing a venue where people can meet, discuss, learn and plan out alternatives to existing power structures and develop the praxis for the same.

1.2.11 The setting up of the Dalit department and the Legal Aid cell are indicators that ISI/TC is keen about giving institutional structures to its responses to social realities.

CHAPTER 2
GOALS AND OBJECTIVES OF ISI/TC

"ISI-TC, Bangalore is a national social centre, run by the
Jesuits in India, in collaboration with men and women of
goodwill, concerned and committed to issues of social justice
and human development in India and neighbouring South Asian
countries.

Main activities - Training of community workers and social
activists in the theory of social analysis and skills for
social action for social change.

Main focus - weaker and marginalised sections of society like
tribals, dalits, women, marginalised farmers, landless
labourers, unorganised sectors of Indian labour force and
ecological and human rights issues."

brochures of ISI-TC, Bangalore.

2.1   Goals and Objectives:

The objectives or purposes for which the Indian Social Institute
was established, as given in its amended Memorandum of Association
(1969) are as follows:

a. To assist in the study of social sciences both theoretical and
    practical.

b. To promote research in the social, economic and cultural
    problems of India.

c. To publish books, magazines, periodicals on social, economic
    and cultural problems of India.

d. To publish books, magazines, periodicals on social, economic
    and cultural subjects.

e. To maintain libraries and reading rooms.

f. To perform works of charity - social, moral, economic and
    spiritual.

g. To diffuse social, cultural, secular and scientific knowledge.

2.2   The 1980 and 1990 Statements:

2.2.1   In 1980, there was the first clear collective statement by the two
        ISIs jointly that their primary task was to contribute to the
        emergence of a just social order.

2.2.2   The search for identity and role in the Indian context was
        articulated in the December 1986 statement of the Governing Body
        of ISI on the reorganisation of the Institute. Its own realities
        of being a church related Jesuit institution, with its

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contributions of christian action for social change in a non-sectarian manner was accepted. It also accepted that an institution cannot spearhead people's movements but can play a strong supportive role to build up peoples' organisations and movements. Through action-reflection, participatory research, analytical training programs, it was seeking to play this role. Questions about internal functioning and activities that may not be consistent with the overall thrusts were discussed and formed part of the experimental search for alternatives.

2.2.3   The Board agreed to concentrate on the most marginalised groups among the oppressed: tribals, scheduled castes and women. "Avoiding exclusivism.....of thinking of these groups only as social groups without any class perspective, or only speaking of the oppressed....we should be prepared to begin with these groups and go towards a class alliance."

2.2.4   The 1990 statement reemphasized this commitment. The first chapter of the 1990 Annual report affirms that "in its 1980 statement ISI had given itself a new orientation, to stand for the weaker sections and to work for the liberation of the oppressed which would lead to the creation of a just social order"

After a brief review of the Indian situation, the two basic ideas or thrusts of the 1980 statement were identified as follows:

a.   the need to promote societal analysis at various levels

b.   to create/strengthen/promote peoples' organisations.

2.2.5   The 1990 statement jointly prepared by the staff of both ISIs acknowledged that the activist dimension of ISIs was weak with only marginal interest and involvement in mass movements and socio-political processes. A series of 6 time bound resolutions were made regarding structural, administrative and attitudinal changes that were considered necessary. The staff of ISI-TC could use these as points for discussion as part of their self evaluation process.

This was an important statement of commitment. However it was very general and one is not aware of any strategies that were evolved following this statement.

2.2.6   The following excerpt from a Governing Body Minutes may be useful to the centre to understand the dilemma within the organisation of ISI itself:

"Identity of the Indian Social Institute:

i.   Where does ISI stand in its relationship to the activists on one side and the professionals on the other? The general feeling was that there is a dilemma and one has to put these two aspects together.

ii.   While stating this, and looking at the 1980 statement, the House felt that there was a contradiction between the stated objectives of the Institute and reality as it exists. First of all, there is a need to employ rural

activists, particularly persons from the scheduled castes and tribes, since these are our priority areas. However, there is a danger that they do not feel comfortable in the present set up.

iii. On the other hand, there is a danger that the middle-class urban staff that we have, may think primarily in terms of their own security. We have been searching for participation. There is the danger of this participation remaining inside the institute, without it becoming real in our work outside.

iv. Hence much more effort has to be made to turn ISI into an outward-looking Institute that has participation not merely at the highest decision-making level, but within each department and programme, as well as in the work outside.

v. The need was felt to take the staff through a deeper social analysis of the situation around, and for greater involvement in the field, particularly among the most marginalised sections such as the tribals, the dalits and women from these sections."

However, we see little documentary evidence of how such dilemma was addressed by the ISIs, and what line of action was adopted.

2.3   The OOPP Workshop of 1992:

2.3.1   At the OOPP workshop at ISI/TC in April 1992, the overall objective was stated as "empowering the powerless for sustainable development". There were evidently different perspectives and views. This would probably need discussion and re-discussion on an ongoing basis especially with the addition of new academic staff. The project purpose was to be an "effective resource centre for involvement with the socially concerned". The most heartening aspects are the 13 key result areas that have been identified for ISI/TC to work towards.

(Annexure 4)

2.3.2   The challenge before ISI/TC is now to put its intentions into practice in right earnest and not get too introverted into its internal dynamics. The reasons that prevent it from taking up the result areas for serious work should be thoroughly analysed. In the ultimate analysis, the strength of an institute is not manifested in its analytical skills alone. Equally important is its capacity to deliver goods, to perform.

2.4   Changes in Perception of Social Realities and Responses:

2.4.1   It is a welcome change that ISI is going in for a more holistic form of interest and interrogations into an unequal social life. The challenge before it is now to develop a common thrust towards ideological pluralism and diversity of approaches, even if it is a slow process.

2.4.2　It is indeed not an easy task to deal creatively with a wider spectrum of perspectives - trying to unite economic disparities with problems of caste formation, denial of common property resources to the rightful owners, the women´s question, emerging cultures, issues related to our common future, the planet earth, ecology and environment...

2.4.3　How far theoretical intentions are being given the necessary practical organisational support in ongoing activities in these areas will remain a challenge for those who manage and shape this institute. That the new orientations are in the right direction is beyond dispute.

CHAPTER 3
INTERNAL EFFICIENCY OF ISI/TC

Critical observations/suggestions that are made here are not done with the baseline that there is no efficiency in this institute. It is a question of the standards one need to set for oneself and for one's work. A centre like ISI/TC will need to put far more emphasis on this area than it is doing at present. Being a training centre that has to cope with large numbers of visitors, in-residence participants, and seminar delegates it is crucial that the suggestions made in this section are implemented and if not implemented at least thought through. Much of the observations here have been based on anecdotal evidence.

3.1   Team Concept and Participatory Management:

3.1.1   Since the "Team" is so much talked about and greatly appreciated by all concerned, and nevertheless, since there seemed to be serious problems in the way it was introduced, internalized and practiced, and since it sometimes seemed to affect the efficiency and effectiveness of the institute, the evaluation team went into great details regarding the team approach, during discussions with staff members and a few others.

3.1.2   As articulated by Fr. Dominic, the team concept demands: that the team defines the functions and responsibilities of each member, that decisions and plans are made in the team, and disciplining is a team responsibility.

3.1.3   Most staff members found this a very good concept, a sort of ideal to work towards. They mentioned that it was an educative, learning process and that it has also helped them in their personal growth. It equips team members in understanding each others problems, in getting along with each other and in being more responsible for one's own actions.

3.1.4   However, there were certain problems mentioned regarding the actual functioning of the team concept. It tends to slow down processes and cause delays in decision making and in action. The team is sometimes used as an excuse to suit the convenience of people. Lack of maturity, openness and genuineness can vitiate the team concept, and make a tool for serving self-interests, at the cost of common good.

3.1.5   There appears to be a lack of clarity about common goals and individual responsibilities. Certain issues vitally affecting the institute may not be considered. Not all decisions are taken at these forums and not all are responsible for them. Though everyone is given an opportunity to share views, there is a domination by the more articulate. Differences in education, language proficiency, experience of group functioning can cause a degree of inequality. There is a hidden class divide. Genuine needs and crucial issues are sometimes not attended to. Some staff do not speak up, feel diffident about it, or do not adequately prepare themselves for it.

3.1.6 The team process is inherently one of slow growth, with gradually increasing levels of consciousness, self-awareness, self management and sense of responsibility. All team members felt that the process was a useful one and should be continued. There is probably a need for catering, maintenance and housekeeping to also have their own team meetings as their problems and needs may not get enough recognition and space for being raised in total team meetings.

3.1.7 Educating the team members to the concepts, methodology nd skills of team work is also of great importance. Often, the people who require such insights do not have them, since there is no effective communication media and training plans for them. Without such process of critical awareness among all, the introduction of a team approach can lead to lack of accountability and poor sense of responsibility. Team meetings themselves can get ritualized. Real issues that concern the institute may never get to be discussed.

3.1.8 It is a myth to think that creative work is accomplished in an unregulated atmosphere. Most good work on the contrary has been accomplished in a highly organised culture. The team process is not an end in itself, but a means to strengthen ISI/TC internally to work towards achieving its goals. There is no point in self and team development unless these contribute to greater sense of belonging and participation in the tasks of the institute and in its efficiency and impact.

3.1.9 Efficiency is very much related to accountability. A clear organisation structure will help individuals in the organisation to perform and take responsibility for their role and function. A team should not become an excuse for not demanding and not discharging accountability. This is the basic obligation the institute has to its clientele and partners.

3.2 Staff:

3.2.1 There seems to be poor coordination between the staff. When a delegate reaches ISI, there is no responsible staff member there who will help the visitor by giving information on the room reserved, making available the keys and generally being of courteous help to the visitors. Many have complained that the staff members usually tell the visitors to wait for the organisors! When fees have been collected, it is incumbent upon ISI to handle all the arrangements. Delegates are often seen running around to arrange their own seating.

3.2.2 The staff seems to have limited sense of institutional functions, for that matter of their own functions. Their appointment letters (not issued in several cases), should carry job descriptions which will help give them a sense of focus in their duties. There must be constant supervision and guidance by the senior staff to make sure that everyone is there handling their duties themselves and not implicitly expecting someone else to do it. In the present situation, what is happening is that there is either nobody one can turn to for a problem or there is a duplication of services. The structure has become such that without the director

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intervening no one can be made to be accountable.

3.2.3   While it is legitimate to believe that responsibility should be in the hands of individuals themselves, experience often tells us that some are more responsible than others, and that those who work end up doing all the work. Job descriptions and constant monitoring, including attendance registers are required to spruce up the entire administration. ISI/TC must project a highly institutionalized and yet creative approach so that it can reflect its social concerns with sustained efficiency. If the west has one thing to boast of it is that they know that most genius is 99% hard work and 1% inspiration. Even if it means some bit of authoritarianism for the director, he will have to haul up the entire staff and make sure that they all get their tasks done.

3.2.4   If indeed the team is to be the forum for accountability and disciplining, then there has to be much more serious approach to team meetings. There should be very high expectations on how team members should prepare for these meetings, what type of reports they should present, how decisions are taken, recorded and followed up and reviewed, how agenda is prepared for meetings, what happens if well prepared reports are not presented, if decisions are not implemented, etc. All these expectations should be clearly communicated and established as procedures.

3.2.5   Almost all staff, administrative and academic, need in service training and even external training to carry out their tasks efficiently and to develop the necessary skills and competence in the areas of work taken up by them.

3.2.6   The question of accountability to ISI/TC's goals and objectives and the purpose for which such an institution exists as well as accountability to course participants/people using its services also needs consideration. The team is the means to strengthen ISI/TC internally so as to work towards its goal. It has probably reached a level now that questions of directions, strategies and quality of services need to be seriously re-discussed with the staff.

3.3   Financial/Accounting Practices:

3.3.1   The relationship between the ISI/TC and the donor organisations is commendable. This has greatly helped the TC in making its own financial plans for self reliance. Healthy financial management reflects good accountability to the people and it is a healthy sign that ISI has maintained its books in order.

3.3.2   Going through the audited statement of accounts from 1.4.1991 to 31.3.1992, it has been observed that the accounts have been maintained carefully. According to professional opinion also, the books of accounts have been in order. This reflects well of this institution.

3.3.3   However, in an organisation where team approach to administration, collective responsibility and accountability are being experimented, it is important that the financial aspects of the organisation are made more open, standardised and clearly

communicated to the team members, to stop unwarranted comments on what is happening on the financial front, and to, in fact, create the environment for responsible planning/spending/accounting. Team members need to understand the purpose of financial planning, donor's involvement and financial statements.

3.3.4   One of the worrisome aspects of the accounts was the fact that the reserves tended to be of a large amount, about Rs.62.5 lakhs. It is understandable that most organisations need to keep reserve funds for an emergency, for at least about six months of operational costs. It is obvious that such large reserves are not built up from funds generated annually from local contributions, for hostel, catering, course fees, etc. What would be preferable is that the accounting shows separate booking for what is earned from the training programmes, what component is being subsidised and ultimately, how the remainder is part of the administrative accounts.

3.3.5   It is important to note that ISI has not been perceived as a typical NGO organisation/initiative deserving support. With all its donor organisations, ISI/TC seems to have had many years of partnership. This is probably reflected in the fact that TC has never faced problems of donor support especially in financial terms. It is probably because of the special relationship that donor organisations have with ISI (including projects appraisal/ monitoring/evaluations on behalf of donors), that they have not raised any questions about the larger than usual reserve funds.

3.3.6   As ISI/TC is striving for self reliance, one tends to believe that these reserves are being maintained for that time when they can run their services on their own. Large financial reserves must however be ultimately utilised so that they do not appear to be there just for "accumulation for the sake of it". Such a situation can lead to a sense of false security and complacency and even reduced accountability to the people for the quality and relevance of the services rendered. Delhi ISI has already begun to offer training programmes under different rates based on the ability of the organisation to pay. This is a sound move and can be replicated here.

3.3.7   As noted above, it is also important that ISI begins to plan for the phase when it can begin to minimize donor contributions and maximize on its own potential to get support from the Indian Public (self reliance by building large reserves based on foreign funds is not always the best strategy!). Certain amount of professional services, consultancy works, research studies for and charging professional fees for certain training/support services are potential areas that need to be carefully considered, for merits and problems. Such self reliance may provide the scope it needs to function autonomously in the area of social and political emancipation.

3.4   Hostel and Infrastructure Facilities:

3.4.1   Many organisations today would prefer to host conferences in Research Institute rather than in Hotels, but a constraint is that often institutes do not have the infrastructural requirements
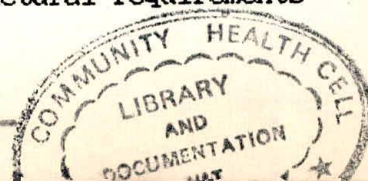
e.g., Slide Projector, Overhead Projector, Recording System, Screen, Audio-Visual aids, etc. ISI must certainly develop this infrastructure and see to it that combined with efficient service it becomes a training centre worth utilising.

3.4.2   The administrative staff needs to space out the programmes. People complain of over crowding. While most people felt positively about using ISI as a training centre or as a venue for their workshops, they felt also that greater care and responsibility should be taken for the actual day-to-day services.

3.4.3   ISI/TC also needs to seriously consider its tariff policies. Applying the principle of cross subsidy, organisations that can pay more, should be asked to pay more, and this should go towards subsidizing organisations that deserve such assistance.

3.4.4   In order to prevent last minute cancellations, non-refundable advance payment should be insisted on. Even if course fees are subsidised, participants for ISI/TC programmes, and for co-sponsored programmes, should be asked to advance full payment along with registration.

3.4.5   ISI/TC has obtained professional consultancy services to make a study of the existing hostel/catering/housekeeping services, and to make recommendations for improved procedures. The evaluation commission is of the opinion that such assistance is of critical importance. It is hoped, the recommendations will be considered seriously and standardised procedures and reporting/accounting procedures will be developed. Along with these, the staff need to be trained and equipped to discharge their tasks with competence.

3.4.6   Of importance is the vigorous follow up of the plan to finalise an administration manual for the institute. This deserves great attention and priority. Along with the manual, appointment orders, job descriptions, etc., should be issued to all staff. Standard procedures/record keeping/reporting and accounting systems should be set up, carefully explained to all staff (in vernacular, wherever necessary), promulgated and consistently enforced.

CHAPTER 4
ACADEMIC, TRAINING AND OUTREACH SERVICES

It must be emphasised here that this is a rather rapid appraisal of the academic and outreach services of ISI/TC, done alongside other aspects of the evaluation. As agreed to during discussions with ISI/TC staff, no claim is made here that this aspect of the evaluation is complete.

The time framework of the present evaluation was such that it was not possible to comment fully on the quality, relevance and impact of the training programs. This would require more detailed study based on feedback from participants, trainers, collaborators.

The observations and conclusions are tentative and are intended to provide ISI/TC with issues that need to be taken up by it for deeper analysis through a more structured feedback gathered from the participants of the next three months course (August to November 1992) and a sample of previous participants.

4.1 An Overview of Training Activities:

4.1.1 ISI/TC has achieved its credibility based on its training programs. In fact, training/outreach is the reason for existence of ISI/TC, and therefore of central and vital concern to the entire institute.

4.1.2 Information (data) for this section was gathered from the following sources:

    a.   the concept paper and tentative programs and time table of the three months course (August - November 1992)

    b.   Course materials (background papers) given to participants for the above course

    c.   Annual reports of the past three years

    d.   A report on ISI, Bangalore, December 1991 by Fr.Dominic

    e.   Report of OOPP Workshop

    f.   Discussions with staff and a few other people

4.1.3 Goals and Objectives of Training Courses:

There is need for greater clarity regarding the goals and objectives of the training programs. While these were fairly sharply understood earlier, various factors given below require that these need to be re-looked at and redefined:

    a.   With an increase in the number of academic or training staff from just two to six and perhaps more, there is a need for a collective understanding of perceptions, positions and views at least on core areas. If each staff member is allowed to have their own approach based on their own understanding and

analysis, it could cause several problems and confuse the participants.

b. With the rapid socio-economic-political changes taking place, there is definitely a need for debate and re-appraisal of the training programs.

c. With a large number of groups/institutions providing support services including training to social activists, it would be useful to identify the training needs of the activists/ potential course participants and what are the areas where ISI-TC could contribute the most.

4.1.4   Training Content:

Based on a rather quick appraisal of the three months course and on discussions with staff/and a few others, the following points are raised:

a. The process of evolution of the courses has always taken place, for e.g the introduction of micro-analysis, skill training, group work, etc. and of the training courses conducted in Tamil and Kannada. However, to avoid stagnation and routinization, review of course content needs to be an active and ongoing group process. The training staff also perhaps need greater stimulus, support and recognition for their inputs.

b. The predominant emphasis on class analysis to the relative exclusion of the other factors operating in Indian Society seems limited. Several other groups have done work on factors such as religion, caste, language, gender, religion, region, etc., that also play a role in stratification of Indian Society. Other areas like ecology, health, the media, law, etc., have also been studied more specifically, based on Indian experience. These factors/areas could be looked at systematically, building on the substantial material already available.

c. There is probably need for greater study, analysis and inclusion of the thinking of Indian Social thinkers like Mahatma Gandhi, Dr. Ambedkar, Lohia, etc.

d. Participants could be exposed to contemporary Indian groups and movements as well, for example, the peoples' science movements, dalit movements, women movements, and that of peasants, fishermen, bonded labourers, tribals or indigenous people, environment groups, health activist groups, etc.

e. Third world realities of several more countries should be presented and analysed, if possible by people who have some expertise on issues facing these areas.

f. Issues and subjects like capitalism/socialism/ IMF/World Bank/Structural adjustments/ Sustainable Development/Collapse of Socialism, etc., should be presented much more creatively - presenting various views/positions as expertly as possible, and allowing the participants to react and respond as adult

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learners.

Views of like-minded groups/people with an expertise and experience in this area could be sought in evolving training course content.

4.1.5   Methodology:

Since ISI/TC deals primarily with adult learners, there is scope for improvement in the teaching methodology employed. The focus on the learners and on active learning processes with the team of trainers functioning as facilitators, is a shift from the more traditional concept of didactic teaching. Participatory training is also getting more widely used. ISI/TC already uses group discussions, paper presentations, writing assignments, simulation games and film discussions. However, these need to be made more effective and better planned.

There is scope for greater use of audio-visuals (slides, overhead projectors), case studies; panel discussions, field or community based exercises, group games and exercises on understanding Indian Society and also some on group dynamics.

4.1.6   Quality, Relevance and Impact:

As expressed earlier, an evaluation of these would require more detailed study based on feedback from participants, trainers, collaborators.

Over the past fifteen to twenty years, participants of various ISI/TC courses have gone back to the field and have initiated various processes based on the analysis and insights received. While accepting that their training at ISI/TC may not be the only input or factor influencing their actions, it would still be very useful to study what has happened to the initiatives, and from that perspective to identify the strengths and limitations of the training programs. Various approaches could be used for this study, for example, case-studies, questionnaire and consultations which could give feedback into the current training programs.

In fact, the evaluation team was happy to learn that such a bottom up process is being planned, in collaboration with the Research Department of ISI/New Delhi, for evaluating the relevance and impact of ISI/TC training inputs, and for evolving new training objectives, content and methodology.

4.2   **Areas for Reorientation:**

4.2.1   There has been an increase in the number and variety of training programs offered by ISI/TC on its own, as well as in collaboration with others. There is probably now a need for consolidation, identification of a common core thrust, staff development, development of new training materials, greater and systematic development of the library and documentation services, identification and establishment of linkages with outside resource groups and greater participation of ISI/TC staff in programs co-sponsored by them.

4.2.2   The formation of an educational council may benefit such a process. This could include one or two key trainers of the past and the present staff, one or two previous participants who have been very good and have the requisite experience and understanding and two or three outside resource persons, including trainers from reputed training organisations - who could also supply ideas on pedagogy and methods.

4.2.3   Tie up with reputed training organisations in other countries of the world should also be seriously thought of. If possible, promising academic staff should be sent to such institutes for exposure, and staff of such institutes invited to work with ISI/TC for short periods.

4.2.4   ISI/TC involvement in the content and methodology of co-sponsored courses is less than adequate. Co-sponsorship should mean more than lending premises, organising infrastructure, and subsidising costs.

4.2.5   Training syllabi, training materials, reading materials, stand in need of urgent updating. More systematic efforts need to be made in preparing proper training materials, in discussing the content and methodology among the academic team members, and in developing good training modules for all courses organised/co-sponsored by ISI/TC.

4.3   Academic Staff:

4.3.1   Selection of academic staff needs careful thought, based on clearly defined policies. ISI/TC should attract at least 2 or 3 competent trainers, with experience, maturity and skills in teaching, learning and communicating.

4.3.2   Enrichment of academic staff should be taken up through:

    a.   interaction with groups involved in peoples´ movements and organisations

    b.   through field/issue based research

    c.   systematic and regular in house discussions/studies/ presentation of papers

    d.   systematic and advance planning for courses

    e.   training of staff in communication skills and adult learning techniques

    f.   exposure to other leading training institutes

A comprehensive staff development plan needs to be worked out, assessing the strengths and needs of each academic staff.

4.3.3   Adequate number of senior academic staff and a stimulating and challenging environment required in an academic institute of excellence are found missing in ISI/TC. Academic staff need to constantly be abreast with latest events and critically studying

these in terms of how they affect the life situations and life chances of the poor. An atmosphere of serious study, discussions, scholarship needs to prevail. Without these, the institute may end up for all practical purposes as a hostel facility for other organisations. Existing salary structures and lack of other avenues for career prospects may make it difficult for ISI/TC to attract competent staff. This issue needs to be carefully considered by the Governing Body, and suitable remedial measures urgently initiated.

4.4   Outreach Services:

4.4.1   Even earlier reflections on ISI/TC have drawn attention to the need for training inputs to be linked with grass root realities. In the opinion of the team, this link alone will ensure that the academic output is relevant and of high quality. Interaction with movements and organisations, both within Bangalore and in the states from which ISI/TC clientele are drawn, need to be planned carefully. One way would be to seriously consider field based follow up of training programmes.

4.4.2   Field based training of organisations, cadres from organisations of a particular region, etc. though being attempted now, need to be planned and followed up more systematically. Such programmes should be the responsibility of the entire academic team, and not left to what one or two individuals can do. It is generally felt that the dalit outreach within ISI/TC is not adequately planned, supported and evaluated as a team task.

4.4.3   It is hoped that the newly set up legal aid cell will come up with refreshing ideas for such outreach programmes and net working with socially concerned legal experts and organisations, and not limit itself to institution based para legal training. The outreach, legal aid and academic staff could together identify pertinent issues, that can be addressed through training/legal and other institutional supports to organisations dealing with such issues at the grass root level. Legal aid could also initiate public interest litigations, and other innovative legal measures to support movements, closely involved concerned organisations, so that such legal interventions also contribute to heightened consciousness among people of their rights and regarding unjust and exploitative situations.

4.4.5   During the OOPP workshop, very pointed questions were raised regarding the constituency and clientele of ISI/TC. Concept papers were to be prepared on this subject and discussions initiated on it. This decision should be followed up urgently. The team is of the view that, apart from the general floating clientele who attend courses organised at ISI, it may be good to explore the feasibility of fixed clientele as well, consisting of groups, organisations, movements at the grass roots, to who ISI/TC provides training/ micro-macro analysis/organisation development/net work/research and documentation supports. Such clientele will also force the academic staff to be constantly alert and updated and to perform at their best, apart from giving to institution based training much more of contextualisation and pragmatism.

4.5   Value Education:

4.5.1   It may be pertinent to raise the issue of value education content in ISI/TC training programmes. Issues related to activist culture and ethos, participatory and humanising management of organisations, staff and people, self awareness, personality integration, etc. also need to be introduced more and more into training programmes. One is today more than aware of the inherent dangers and contradictions in elitism, which creep also into liberating movements. The slow corroding of human values and personal concern, disintegration in personal life, hidden agendas in programmes and action, pseudo-radicalism as a cover to frustrations and inability to cope with and come to terms with oneself and one's reality - these are issues that are of very serious concern today. Several promising movements and committed activists labour under such problems.

4.5.2   It is recommended that ISI/TC work further to operationalise its insights on value education (some of the discussions and recommendations of OOPP cover precisely this area), and develop them into training courses, evaluation/monitoring/self criticising tools, without at the same time ending up in moralising. Value education is as much a matter of skills as of attitudes.

4.6   The Urgency for Catalysing and revitalising Inputs:

4.6.1   A passing survey of attendance in ISI/TC training courses in terms of numbers and experience/background/level of competence of participants, indicate alarming drop in demand. The 3 months course, supposedly the show piece, is a case in example. What this indicates need to be carefully considered. The team feels that this is symptomatic of structural issues. When more and more training institutes and trainers are entering the development field, and training is subsidised and sometimes leisure activity, ISI/TC cannot hope to attract to itself serious minded adult learners unless the institute maintains for itself its position of pre-eminence and offers to trainees more services and inputs than conventional training institutions and programmes do.

4.6.2   To take up such deeper analysis of the access strategy (plan for reaching and providing services to targeted groups), program utility, bias (extent to which programs are participated in differentially by sub-groups of a targeted groups), etc., ISI/TC needs to address the "who will bell the cat" question. Without a master policy for academic personnel, and without vigorous implementation of this policy, all these can remain idle wishes.

4.6.3   Here, the Jesuit management is squarely accountable for considering its ownership of the institute as no more than a de jure issue. Unless competent personnel are made available, no institute can perform. Unfortunately, the Jesuits of India have not sat down and thought through this issue of ensuring adequate competence and then challenging ISI/TC for excellence in performance.

4.6.4   Without supplying such competence and ensuring its sustainability,

the ISI/TC governing body and the Jesuits in general cannot be considered as stimulating the environment, and hence as being fair with the institute and with its personnel. It is too much to hope that a single senior academician can work miracles (even if he can sustain the will and the interest for it)!

4.6.5   In the mind of the evaluation team, this issue cannot be postponed any further. ISI/TC is perhaps living on its past glory. It is incumbent on the Governing Body to match infrastructure development, with human resource development, and more urgently to provide some basic requirements for such planning - the core planning/evaluation team itself.

CHAPTER 5
FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

5.1   Historical Perspective

5.1.1   It is indeed welcome that ISI/TC is going in for a more holistic form of interest and interrogations into an unequal social life. How far these theoretical intentions are being given necessary practical organisational structures, and integrated into its history will be the real areas of challenge for those who manage the institute.

5.1.2   It is also hoped that strategies will be evolved to ensure that the developing history of ISI/TC is a history written together with the people and not merely by the elite and leaders. Involvement of the personnel, clientele, other training organisations, activist groups, etc. should be structured into the ideology debates in ISI and among the Jesuits. This way, the directions of growth will not have violent swings as personnel come and go - since the ground realities dictate the path. The challenge is to have a methodology for listening and interpreting the reality, being critically conscious of one's own positions.

5.1.3   Being a Jesuit institution one would expect the influence of Jesuit principles, orientations and values to play a determining role in the development of the institution. This has to be consciously accepted. At the same time, the Jesuits need to enquire how seriously are they involved in contributing their insights, visions, values and in dialogueing with ISI on these.

5.1.4   The evaluation team would like to invite ISI to attempt such a democratic and participatory interpretative history of ISI, as intervening into the reality of Indian Social situations.

5.2   Strategies to Achieve Goals and Objectives

5.2.1   Very clear collective statements by the two ISIs jointly were made for the first time in 1980. It stated that their primary task was to contribute the emergence of a just social order. The 1990 statement was an elaboration of this commitment. However it was very general and during the evaluation study it was found that no clear strategies were evolved to realise this commitment. It was also found that there was no consistency in efforts to monitor how those strategies were being turned into actions, and what were the demands and consequences of such praxis.

5.2.2   During the 1992 OOPP workshop, different perspectives and views regarding the overall objective of ISI/TC were discussed: the emphasis shifted to processes - of empowering people, and just social order was seen as the ideal towards which empowering will contribute. Empowering was seen to possess various dimensions - from the political economy issues to humanising and deepening life and values of people and of activists.

5.2.3   The implications of the shift in perceptions of the goals and

objectives of ISI/TC need thorough discussions on an ongoing basis, especially with the addition of new academic staff and involving other scholars, activists, grass root organisations, and governing body members. In such discussions, the categories and paradigms of thought that need rethinking or further interpretations can be identified. Based on such discussions, the strategies for becoming an "effective resource centre" will have to be decided - the existing ones, and new possibilities. From such critique should evolve new training courses, methods, new modes of involvement, reaching out and accountability.

5.2.4 The team felt that ISI/TC was acting and thinking in isolation. It presently lacks sufficient peer review and feedback from its clientele. Far too much of the debates on ideology have been polemics, not involving the vast majority. Efforts to convert these into efficient and effective programs and activities have been disproportional to the debate itself.

5.2.5 The question of accountability to the goals and objectives of ISI/TC and the purpose for which such an institution exists as well as accountability to course participants/people using its services also needs consideration.

5.2.6 The operationalisation of the idea of some fixed clientele to which ISI/TC will provide field based resource support in terms of training/networking/research and documentation services/management and staff development services, etc. will also contribute to the strategies evolved for meeting the goals and objectives.

5.3   Management and Administration

5.3.1 Though there is an effort to introduce team management and accountability which are indeed laudable, they have not proceeded beyond concepts into well thought out methodology nor are team members adequately equipped for such an approach. At present, the team is a vague and nebulous concept and cannot be considered as a here and now operational management option.

The concern and need for team is not the articulated need of every person. While team management is an expression of humanising values and an affirmation of the right of the worker over the product of his work, and over the means of production, these value affirmations need to be matched by serious efforts to make team an operative concept.

5.3.2 The evaluation team strongly feels that an adequately thought out and poorly institutionalised team management may have led to all sorts of administration, accountability, performance and human problems. Equality and equal participation do not always practically exist, despite the good intentions. It was found that not all decisions, not even all the key ones, are taken in the team forum and not all are responsible for them. Some of the staff members expressed that though everyone has the opportunity to express and share views, there is a domination by the more articulate. The seriousness staff brings to team meetings in terms of presentation of reports, following up decisions, etc., also leave much to be desired. The team approach should not be allowed

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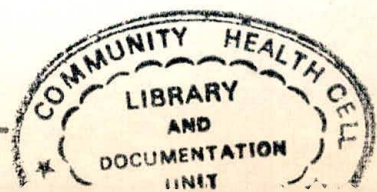
to checkmate toning up of administration.

5.3.3   There seems to be poor coordination between the staff and little sense of institutional and individual functions. Consequently the management efficiency and effectiveness are less than desirable. Institutions and procedures for clearly assigning responsibilities and for deeming accountability for them are very inadequate.

5.3.4   Difference in levels of education, language proficiency, experience of group functioning, and skills for group interaction, have caused a degree of inequality among the staff of the TC.

5.3.5   Despite all these, the vast majority of the staff members felt that the team process should continue. The evaluation team is also of the same view - not so much in terms of what it does now, but for the potential it has.

5.3.6   It is important to evolve an intermediary strategy, so that even as experiments and searching goes on, efficiency and accountability are maintained. In the final analysis, only performance will guarantee that the team experiment will be continued with, even when leadership changes.

The staff of the catering and housekeeping sections expressed the need to have their own team meetings (in local language), so that the problems related to their functioning get enough recognition and space.

5.3.7   It was found that most of the administrative staff did not have clearly formulated job descriptions and standardised code of procedures. The staff need to be given clear job descriptions so that they develop a clear sense of focus in their duties. There must be constant supervision by the senior staff, not to control but more to guide and help staff to perform. Building up the efficiency of staff itself will build up the confidence of the individual which will help the individual in personality growth and in team performance.

5.3.8   The staff members are urgently in need of systematic training in discharging the tasks assigned to them, especially those who have record keeping, reporting and coordination/leadership responsibilities. All the staff also need deeper training inputs on self awareness, interaction and communication.

5.3.9   Salary scales should be on par with other training institutions. It has been reported that there is a Salary Commission set up to go into the Salary aspects of ISIs. This evaluation team suggests that the commission be fielded as early as possible to support the efforts taken by ISI/TC in reorganising and streamlining its administration, and take a very realistic look at the issue also in relation to staff turn over, attracting/retaining competence, etc.

5.3.10   The senior positions should be advertised. This will allow for a wider choice of candidates and for a more objective assessment for job competence. Constraints against this should be identified and resolved.

5.3.11 All job contracts should be standardised and regularised and reflect a legal contract between the employer and the employee. There should be no ambiguity and this will protect the long term interests of the institution. It will also give the employee the needed impetus to give off his/her best.

5.3.12 Second generation of leadership needs to be carefully nurtured. This is crucial for the future well being of this important institute.

5.4   Finance and Accounting

5.4.1   Going through the audited statement of accounts from 1.Ø4.1991 to 31.Ø3.1992 it has been observed that the accounts have been maintained carefully.

5.4.2   The issue of large reserve funds (Rs.62.5 lakhs), as guarantee of self reliance raises some worries. Channelling donor funds into reserves, whatever be the procedure used to overcome the legal issues, and even if practiced with the knowledge of the donors, raises questions on the real meaning of self reliance. Such assured fund position could lead the institute into situations of lethargy and complacency.

5.4.3   It was found that there was no standardised accounting procedure and financial situations/plans were not made available for open discussions in a systematic way, through presentation of financial reports in meetings. It will be a good idea to circulate the audited statements to all members of the ISI/TC so that the staff will feel a sense of collective responsibility (if it is not already being done) and financial accountability and reduce chances for unhealthy gossip.

5.4.4   Separate ledgers are not being maintained for income and expenditure from hostel/catering, etc., which would have given valuable data for self-reliance planning, for identifying loose accounting practices and tightening the financial management system. This would have also promoted efforts for a more systematic and full utilisation of facilities.

5.4.5   Efforts made to work towards self reliance based on locally generated funds, could include professional services, better planning of cross subsidisation of hostel fees by charging higher rates for organisations that can afford to pay more, insisting on full advance payment (non refundable if cancellations are not based on valid reasons) for reservations, better control over expenditures, etc.

5.5   Training Programs

5.5.1   The efficiency of the training centre is judged by its training content and methodology used for its training program. The training materials are not updated regularly, nor are training methodology carefully planned out. There is hardly any training manuals and modules. All these have led to poor institutionalisation of training. In fact no more than one or two

academic personnel have an overview of the training goals, content, methodology, etc. And since these are not documented, junior staff hardly ever gain competence in training.

The decreasing demand for ISI/TC training services of the institution based and micro-analysis nature, can be seen as symptoms of alternate needs, methods of clientele identification and support, etc.

5.5.2 Not enough attention/time/resources are invested on training materials and infra-structural equipments.

5.5.3 Academic planning is not carried out systematically. There is no systematic follow up and guidance of the junior academic staff. The centre has not made any serious efforts to interact with other resource centres and with grass root organisations to develop training content and methodology.

5.5.4 Though training courses have been diversified, ISI/TC academic involvement in several co-sponsored courses is very little.

5.5.5 The team recommends that ISI/TC takes up immediately an Impact Assessment of the existing Training Programs. Such a consultancy should be able to study the programs as a whole in their relation to the goals of ISI. The contents and the methodology of each course should be studied in detail and improvements suggested. The methodology of such an assessment should involve discussions with participants who have been trained by ISI/TC in the past. Feedback from volags, religious institutions, government organisations and well wishers would also help in the process.

5.5.6 The training materials should be reviewed by not only area specialists but also by persons who are able to assess their impact by visiting those in target areas who had availed of these programs. Many believe the quality of the programs has gone down. More feedback and follow up are also required.

5.5.7 Library needs to be organised as early as possible. Librarian needs professional training. Information storing/retrieval/access systems need streamlining. Computerisation efforts needs to be followed up more systematically, against a time target.

5.5.8 All academic staff need training inputs in: methodology, communication skills, personality development and self awareness skills. Social analysis and its teaching skills, need to be further developed within the team as a whole. For this exposure and interaction seem necessary, both within India and with similar institutions outside India.

5.5.9 In developing training content and methodology, greater interaction with other resource centres and with grass root organizations seem desirable and necessary.

5.5.10 Value education should become a critical area for training. Suitable methodology is yet to be developed in this area.

5.5.11 Academic staff need to work together as a team and set standards for itself in terms of presentation of papers, discussion on issues, involvement with movements, preparation of dossiers and documents, development of well documented and exhaustive training modules, etc.

5.6 Outreach

5.6.1 Though the Dalit and the Legal Aid cells have been initiated as indicators of ISI/TC's concern for greater relevance and contextualisation of training and other resource support services, these programs are not fully integrated into the academic wing. This is particularly true of the Dalit cell. Outreach services are yet to cover adequately the South Indian states.

5.6.2 There is a growing perception of the need for more contextualised and grass root based training, in regional languages. The centre lacks regional language skills, supportive documentation and library services.

5.6.3 ISI/TC could explore further the possibility of strengthening grass root links by identifying and supporting a number of groups/movements with various resource support, including training.

5.7 Staff

5.7.1 The staff of ISI/TC have high potential for improvement. An environment of "chaos" among the administration staff may not be conducive for them to bring out their best in improving efficiency. Administration personnel seem to be by and large adequate in number. However, lack of a systematic organisation of work patterns have reduced the efficiency and quality. Responsibilities, performance and accountability are not sometimes discharged in proportion to positions held in the centre. This has led to discontentment and have served as a disincentive to responsible task execution by staff on lower cadre.

5.7.2 Record keeping, reporting and accountability are found to be below expected standards. These need to be toned up and necessary procedures and routines established.

5.7.3 The academic wing lacks a stimulating and challenging environment due partly to the inadequate number of competent senior academic staff. This is an area where the responsibility lies squarely on the Jesuit management.

5.8 Infrastructure of the Training Centre

5.8.1 The infrastructure has been planned and developed to a standard of excellence. However, the maintenance and utilisation leave much to be desired.

5.8.2 Arrangements for providing hospitality to guests and participants through reservations, receiving guests and cleaning and

arrangements of rooms and conference hall, etc., are not up to the mark, despite the recent efforts to tone up cleanliness and arrangement of rooms. While the gardens tend to be immaculately maintained and aesthetic, the interiors of the various conference chambers and rooms leave much to be desired. More thinking is required also on adequately equipping the interiors.

5.8.3   Advance payments, billing and payment for use of services, and monitoring of income/expenditure are poorly standardised.

5.8.4   The management of kitchen/catering services need better coordination with reservations. Supervision is inadequate. Arrangements for cleaning of plates are unsatisfactory and virtually every user has complained about this (including staff).

5.8.5   A centre like ISI/TC will need to cope with large numbers of visitors, in-residence participants, and seminar delegates therefore it is crucial that the suggestions made under the head office administration, house-keeping and kitchen in the report of the Professional Consultancy on the Lodging and Boarding Division are implemented and if not implemented at least thought out.

5.8.6   Since ISI/TC is not just a boarding/lodging/conference facility, serious thought should be given to "making available of infrastructure facilities" to groups who can easily afford to pay more and do not clearly play a role in contributing to meet the goals and objectives of ISI/TC.

5.8.7   Services to those using the premises for their program need to be upgraded in terms of provision of audio-visual equipments, conference halls, etc. There is not enough attention paid to purchase of training materials and infrastructural equipments. More attention should also be paid on the library which includes also part time services of a qualified librarian. Without this there will be no possible direction to the way the documentation services and the library grows.

5.9   Collaboration with ISI-Delhi

5.9.1   The evaluation team feels that the proposed autonomy for ISI/TC is a creative move. Therefore making any comments about the collaboration in the past may be redundant. However, it is now the responsibility of ISI/TC to think very seriously what they want to do with this space for creativity and initiatives, and on how they can interact and collaborate. Recent efforts for collaboration research is welcomed.

5.9.2   Delhi ISI can also serve as the centre that supplies national policy documents and help update the services here. There can be further exchange of staff on short visits.

5.10   Overview

5.10.1 The evaluation team has been to a very large measure impressed by the services being rendered by the ISI/TC. Equally commendable are the keen interest shown in improving performance and for

internalizing and practicing the values the institute hopes to teach and communicate. There is considerable openness to critique. All these more than justify the investments made on this institute and its continued development.

5.10.2 However, there are some critical areas where ISI/TC could focus in the immediate future. Some of these areas have been broadly indicated in this report.

5.10.3 In general, the evaluation team senses too much of introversion in the institute. Undue concern with team spirit, humanising processes, etc. without evolving systems for ensuring performance can perhaps become counter productive to these very noble objectives. The team is a team because it has a mandate. The team should justify itself in its response to the mandate.

5.10.4 Once administration procedures are established and routinised, they will take care of themselves. There need not be too much fear that people always need to be taken care of, protected and patronised. Authoritarianism, unreasonableness and lack of concern, as and when they arise should be strongly opposed, but the reaction should come primarily from the people concerned. This provides greater scope for creative resolution and enhanced responsibility of all concerned.

5.10.5 The evaluation team is of the opinion that all serious efforts put in during the next couple of years have to be in the area of "what ISI/TC is all about".

Non performance of the more important academic tasks of the institute are also, perhaps, more of concern than flaws in administration.

5.10.6 However inadequate academic performance is to a very large measure due to the inadequate number of competent senior academic staff - for which the management alone is responsible. Once this problem is satisfactorily addressed, and in a sustainable manner, greater performance can be demanded of the academic staff - in terms of search for relevance, updating course materials, improved teaching methods, maintenance of climate of study and searching.

5.10.7 Efforts in this direction has just begun, but will be stymied and cannot be carried forward without people to devote time, energy and skills. Only such a team can provide leadership to the junior academic staff and library/documentation staff.

5.10.8 Another area to be addressed is the accountability issue: not only to the governing body but also to the wider constituency of the socially concerned. Consultation with a larger network and interaction with them in planning, monitoring and annual review seem essential and even in this greater orientation and response has to be to grass root organisations and people.

5.11   Conclusion

5.11.1 In conclusion the evaluation team recommends broad thrust areas
for the future as:

A. Administration:

    1.   toning up of administration and management while
continuing with experiments and explorations on the team
concept.

    2.   equipping administration staff for more effective
performance through the establishment of standard
procedures, routines, record keeping.

    3.   establishing accountability for performance.

B. Academic Work:

    1.   academic staff to work together as a team and set
standards for itself in terms of presentation of papers,
discussion on issues, involvement with movements,
preparation of dossiers and documents, development of
well documented and exhaustive training modules.

    2.   The Jesuit management to seriously consider constraints
to making available to ISI/TC adequate number of senior
and competent academic staff, bringing in creativity,
innovation, and work towards excellence in performance,
planning, follow up.

    3.   The possibility of taking up field based support
services to a specified number of groups is to be
considered and operationalised.

ISI-TC will have to evolve a community that will be constantly critical of its role and its services in a constructive way. It may require greater collaboration with other NGOs, training groups and many others based elsewhere in the South. It must invite faculty from other training institutes like ISEC to review the content of its program. This recommendation the team would like to emphasize because ISI performs a very important role in informing and developing the NGO culture, in updating and most important of all providing a venue where people can meet, discuss, learn and plan out alternatives to existing power structures.

Stronger professional links need to be established with other research institutions, other consultancy services and committed intellectuals so that ISI does not grow inward. There must be a careful process of checks and balances so that ISI is not just used as a venue but seen as an institution that is generating ideas, influencing public opinion and becoming a space where emancipatory interests find their homing ground. For this all the training programmes need to be updated. Money should be invested in getting the very best of specialists to prepare the manuals. If this is not done immediately, most institutions will not consider ISI to be providing training of a high calibre. It is a good sign that there is collaboration between ISI and the National Law Institute in the area of Women and Personal Laws. There should be an effort also in the documentation to provide in the area of law a quick referential system for those who want to understand what different laws imply. This should also be made available in diskette form for easy intra-institutional lending. There are many ways, some being the traditional conference route and others in which ISI can emerge as a leading centre for ideas in the South.

References

1.   Annual Report 1988, ISI
2.   Annual Report 1990, ISI
3.   ISI Staff Team, April 1992
4.   Administration Manual, ISI-TC, Bangalore
5.   Autonomy Document - draft by ISI-TC, Bangalore
6.   Historique of ISI - Fr.Stan Lourdusamy, Feb 1984
7.   Concept paper and tentative programs and time table of the three months course (August - November 1992)
8.   Course materials (background papers) given to participants for the above course
9.   A report on ISI, Bangalore, December 1991 by Fr.Dominic
10. Report of OOPP Workshop, April 1992
11. ISI - New Delhi, Analysis of its Organisation and a Proposal -
                                                    J.Filella, S.J
12. Recommendations for a Better Lodging and Boarding Division of ISI-TC, Bangalore - 1992 - A report submitted to ISI-TC - Andrew Kurian

ANNEXURES

1.   Terms of Reference

2.   Minutes of Meeting held with Staff of ISI/TC

3.   Letter of Rev.Fr.Sebasti Raj, S.J, Secretary, ISI Governing
      Body

4.   Key Results of OOPP Worshop held at ISI/TC in April 1992.

EXTERNAL EVALUATION OF ISI TRAINING CENTRE (1992)
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To The Members of the External Evaluation Commission:

TERMS OF REFERENCE
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2-7-1992

Dear Members of the Evaluation Commission,

THE APPOINTMENT OF THIS EVALUATION COMMISSION IS MADE IN KEEPING WITH THE RESOLUTIONS MADE BY THE GOVERNING BODY OF ISI IN 1992, WHICH RESOLUTIONS HAD REFERENCES ON THE EVALUATION OF ISI-NEW DELHI AS WELL AS THE EVALUATION OF ISI TRAINING CENTRE IN BANGALORE. THIS EVALUATION COMMISSION IS CONSTITUTED TO EVALUATE ONLY THE ISI TRAINING CENTRE IN BANGALORE, KARNATAKA.

TERMS OF REFERENCE

I am giving below the basic framework of the Terms of Reference for your evaluation of ISI-TC, Bangalore, as proposed to you by me in consultation with our ISI staff team. These Terms of Reference may be amplified by the Commission in consultation with the staff team of ISI Training Centre in Bangalore.

1. The Objective of this external evaluation of ISI_TC at this juncture is to get a peep into the history, the evolution, the present status, structure and dynamics of the Institute, and to delineate some guidelines for the future orientation and long-term planning of this National Institute, as seen by three experienced, insightful and concerned outsiders, who have serious social concerns in their life commitment.

2. This study is primarily meant for the help of the Governing Body and the Staff Team of ISI, to develop their own internal perspectives and strategies for better self-evaluation, and for an ever more meaningful and effective service to the relevant clientele of this Institute's services, namely the social activists and the poor and the marginalised people of India and South Asia. This study is also meant for the use of the Funding Partners of ISI Training Centre.

3. The Evaluation Commission could look into the original goals with which ISI was started, and their modifications in course of time; could look into the historical stages in the development of this Training Centre, and the contribution this centre has made to the social scene in India and South Asia.

4. The Commission is requested to study the 1980 and the 1990 Statements made by the Annual Staff Meetings of ISI, and make their own comments on the adequacy or otherwise of these statements, and on the level to which these ideological statements have been

internalized by the Staff of ISI-TC, and operationalised in the workings of this Institute.

5. The Commission could try to delve into the existing staff "culture" (in the broadest sense) of this Institute, and make its comments and suggestions on the limits and possibilities for improvements, concretely making suggestions on the staff development strategy which needs to be followed by the administration here.

6. The Commission should take a good look at the administrative structures and dynamics of this Training Centre, and make its suggestions for improvement, efficiency and effectiveness.

7. The Commission is given full freedom to go into any and every aspect of the structure and functioning of this Institute, and make its creative comments and suggestions with a future and dynamic orientation.

8. The matter of developing a suitable design and methodology for this evaluation is left entirely to the free choice of the Commission members. However, we feel that it would be useful if the development of the design and methodology for this study could be evolved also in dialogue with the Staff Team of ISI-TC.

9. The Commission is welcome to make any demand on the administration of ISI-TC for the fulfillment of the task entrusted to it, and is promised the full cooperation and support of the Staff Team of this Institute.

10. All records, files and documents, including confidential documents, if any, will be put at the disposal of the Commission. The Commission would be quite free to meet any member of the staff of ISI Training Centre, or any person or group whatsoever, from whom useful data may be collected for the preparation of the Commission report.

11. Since the Governing Body of ISI has already constituted a Salary Review Commission of ISIs (Delhi and Bangalore), this specific aspect of the finances of this centre need not be looked into by this Evaluation Commission. But the other financial dimensions of this Institute are not outside the purview of this Commission.

12. The Time Frame of this Evaluation is important. An intensive methodology of Evaluation is suggested. The Evaluation Commission is expected to present its report to the Chairman of the Governing Body of ISI, namely the Jesuit Provincial of India, on or before 15th August 1992, so that the report can be considered by the ISI Governing Body Meeting scheduled for nd August 1992.

13. All expenses linked with the work of this Evaluation Commission will be met by the ISI-TC administration.

Dear Commission Members, YOU ARE WELCOME!

Dominic George s.j.
Director ISI-TC,
Bangalore-560 046

Phone: office: 575189
       personal: 561700

ISI-TC EXTERNAL EVALUATION
MOM with ISI-TC Staff Team on TOR for the Evaluation
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1. Date   July 20, 1992, 4.15 pm

2. Present: Dominic, Tom, Vimala, Lorraine, Antony Raj, Mercy,
                   Kurian, Sounder, Saravanan, Hari, Prasad, Sam and
                   Rebecca

3. Decisions Taken:

    a) The TOR as presented by the Director were discussed with the
        team. The following were agreed to:

        -   an additional item was included in the TOR: "to assess
            the adequacy and relevance of the content, quality and
            approach of the academic and training services"

        -   the thrust of the evaluation would bi-focal:

            i)   an indicative assessment of the impact and
                 effectiveness of ISI/TC outreach and training
                 programmes, from where ISI/TC staff team could
                 take on follow up study and action,

            ii) a more detailed study of the internal efficiency
                 of ISI/TC, indicating areas for improvement, if
                 any, and recommending steps that could be taken,

    b) The Methodology as proposed by the evaluation team was
        accepted as adequate and feasible. The following
        clarifications were made:

        -   individual staff members and staff groups have the
            freedom and opportunity to meet all or any member of the
            evaluation team

        -   team meetings would be organised involving the full
            evaluation team and ISI-TC staff

    c) The Time Scheduling: given the rather wide scope of the
        evaluation, it was agreed that the evaluation team would
        reconsider the time schedule and extend the time frame to
        August 15, 1992.

(Rebecca Katticaren)
CONVENOR OF THE EVALUATION TEAM

DIRECTOR

Indian Social Institute

Centre for Research, Training and Action
for Social and Economic Development

No. ISI/TC/92 . July 29, 1992

Mrs. Rebecca K
Chairperson
ISI-TC Evaluation Committee
Bangalore

Dear Mrs. Rebecca,

You were appointed Chairperson of an Internal Evaluation Committee consisting of yourself, Dr. Thelma Narayanan and Dr. Shobha Raghuraman. However, after my meeting with Fr. Dominic George and two of the members of the Committee I have decided to convert that Committee into the official External Evaluation Committee of ISI-TC according to the mandate given to me by the Governing Body Meeting held on February 1, 1992.
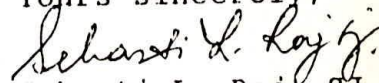
As regards the terms of reference I fully endorse the terms specified by Fr. Dominic George except the following :-

While you are free to share your findings and conclusions with the staff and the Director of ISI-TC before taking a final position I would like to underline the need to keep to yourself the right to reach your own final conclusions independent of the opinions that may be expressed either by the Director ISI-TC or by the staff team there. In other words, the final report will be a confidential report sent directly to me.

I take this opportunity to thank you and the members of the Committee for your willingness to render this service to ISI.

With kind regards,

Yours sincerely,

Sebasti L. Raj, SJ
Director

COPY TO:
FR. DOMINIC

P.S.: Relevant Governing Body
Minutes enclosed
SLRaj sj

10, INSTITUTIONAL AREA, LODI ROAD, NEW DELHI-110003 TEL: 690660, 4622379, 4625015

EXTRACT - OOPP WORKSHOP REPORT

13 Key Results which ISI/TC has to strive to achieve towards meeting its Project Purpose were identified. They were:

1. organisations supported in training of their cadres
2. peoples' struggles supported
3. burning issues studied/documented/information disseminated
4. documentation and library services adequately developed
5. peoples' movements identified and supported
6. dalit movements identified and supported
7. adequate resource persons mobilised
8. staff development planned and implemented
9. infrastructure upgraded and utilisation maximized
10. adequate financial self reliance achieved
11. team management effectively practiced
12. all round autonomy of ISI/TC achieved
13. upgradation of administration achieved