

HDNED EFA/Adult Outreach

Working Paper

**Rethinking World Bank Policy and Practice
In Support of Adult and Nonformal Education**

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FOREWORD

The following paper has been prepared for consultative meetings to be held between staff of the Human Development Network/Education of the World Bank, the UNESCO Institute for Education, the BALID Consortium and counterparts in a variety of international, bilateral and nongovernmental organizations in June 2003. It represents a first working document in a longer-term effort to re-examine World Bank policy and practice in the field of Adult and Nonformal Education (ANFE), to make the Bank's support for these activities more effective and to seek an additional platform of exchange among those organizations most committed to enhancing the contribution of ANFE programs to achievement of Education for All and Millennium Development Goals.

The document will be modified and corrected on the basis of discussions held with participants at the June meetings – and the input of those not able to attend – and a final version with more complete reference to related literature and a fuller description of activities envisaged for the upcoming year will be issued in July 2003.

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Executive Summary

Adult and nonformal education (ANFE) -- a highly diverse subsector -- plays a critical role in the achievement of “Education For All” objectives and in the success of World Bank strategies for Poverty Reduction, Civil Society Reinforcement and Public Health Promotion. It is also an essential ingredient in attempts to promote lifelong learning. ANFE has been inconsistently addressed in Bank programming over the past two decades, despite a relative resurgence of interest in the last five years and a number of signal successes.

In view of these factors, the World Bank has decided to accord a year to assessing lessons learned from ANFE programming and to discussing with stakeholders desirable future directions for its support of these important activities, even while maintaining its current involvements in the field.

The principal objective of the proposed work program is to enhance the effectiveness of Bank efforts in support of Adult and Nonformal Education (ANFE) throughout the developing world and to consolidate the contributions of these activities to Education for All and to the achievement of Millenium Development Goals.

Defining the Field

ANFE programs typically address adolescents and adults who are beyond formal school age or who are underserved by the formal educational system.

- They are offered by a wide variety of social institutions and include literacy programs, agricultural extension efforts, skills training in business and industry, public health outreach, adult civic education and continuing education of diverse kinds.
- All such efforts target the acquisition of particular skills, knowledge and attitudes by participants and most are designed *both* to enhance their individual lives and to improve the situations of their families, their enterprises, associations or communities in some specific fashion.
- Government is a key organizing force in stimulating and monitoring provision of such programs, but design, delivery and at least a small portion of funding are typically handled as well by civil society associations and/or private enterprises.

Relevance to Development Concerns

Adult and Nonformal Education programs condition the effectiveness of Bank-supported efforts to achieve the objectives of Education for All, Poverty Reduction, Civil Society Reinforcement and Public Health Promotion in a variety of important ways.

Education For All: ANFE programs offer a vital complement to primary education strategies for EFA by providing a means of bringing literacy and basic education to unreached or hard-to-serve populations, by equipping parents for more effective support and local management of schooling, and by strengthening the local economic activities in which school leavers may become productively involved.

Poverty Reduction: ANFE programs provide a critical way of making local poverty reduction and economic development efforts – whether in agriculture, natural resource management, small industry or credit intermediation – more participant-driven, cost-effective and locally self-managed... and therefore more sustainable.

Civil Society Reinforcement: Decentralization, improved local governance, the development of civil society and progressive democratization of social institutions all require means for imparting new skills and broader knowledge to leaders and constituents alike. ANFE programs are central to this process.

Public Health Promotion: Public health campaigns -- and the effort to overcome the HIV/AIDS pandemic in particular -- are arenas where “buy-in” from target populations, their acquisition of necessary knowledge and skills and their active participation in eradication efforts are absolutely essential. ANFE programming is designed to serve these purposes.

One important common denominator running through all these examples of the role of ANFE programs in achieving development goals across sectors is that *they serve to build the capacity of local actors and to help them gain the skills, knowledge and abilities required for management of new resources and local direction of development efforts.* Though ANFE activities are extremely varied and show up at every level from the nation to the community, this function of *local capacity building* is particularly critical for all concerned with sustainable development.

Support Needs of ANFE Programs

Efforts to strengthen the critical roles of ANFE programs mentioned above should target those areas where the greatest needs lie and where outside intervention is both most appropriate and most helpful. Performing just such a diagnosis of need and effective methods for government and donor intervention is one of the principal objectives of the work proposed for the upcoming year.

Needs can be analyzed from a number of perspectives. We suggest three categories: supply-side needs, demand-side needs and linkage needs. They offer at the same time one way of representing the dynamics that drive ANFE programs :

- *Supply-side needs* concern effective and good quality provision of the various resources required for successful ANFE work: adequate funding, skilled staffing, relevant curricular material, functional facilities, necessary equipment, consistent monitoring and supervision, appropriate evaluation and research services, etc. It is factors like these that make possible improved service delivery in the field.
- *Demand-side issues* concern measures that cultivate strong commitment to literacy and training among target groups -- what economists would call “effective demand,” or the disposition and ability not just to engage in training and master new skills but also to mobilize the resources necessary for underwriting the activity to an increasing degree. In resource-poor environments, effective demand depends to a considerable extent on the *intensity and value of actual uses for the new knowledge acquired* through ANFE, because local collectivities and associations can only take seriously and begin to underwrite what helps them to establish and capitalize themselves. As a consequence, cultivating effective demand frequently means finding ways to create opportunities for employment, access to seed capital and/or other truly beneficial applications of new literate skills in neighboring sectors of development like those enumerated above.
- *Linkage needs*, finally, have to do with ways of coupling reliable sources of supply to areas of strong demand. They therefore concern both the macro planning of interventions (targeting them on domains where opportunities for beneficial application of new

knowledge clearly exist or can be created) and the design and management of actual programs (shaping and carrying out training in such a way that it meets real needs, blends learning and application and enables participants to assume new functions and roles).

Enhancing the Effectiveness of World Bank – and Other Donor -- Support

How can the Bank – and how can other donors -- most effectively enhance the contribution of ANFE programs to local capacity building in developing countries and to more rapid achievement of Education For All?

The central purpose of the activities outlined hereafter – initiated in March of this year and scheduled to continue through June 2004 – is to help answer precisely this question. We hope to do so by four related means:

- I. Assessment of lessons learned in ANFE support work over the years, through review of literature and interview of those most involved;
- II. In collaboration with researchers on location, design and implementation of targeted research on topics that Bank staff and other stakeholders feel most require new data and insight;
- III. Consultation with partners at international, national and field levels to solicit the fruit of their own experience with ANFE policy issues and their recommendations regarding future directions for the World Bank in this domain; and
- IV. Examination within the Bank itself of policies and procedures that may need to be modified to permit adopting new postures in the field.

Recognizing Progress Made and Starting Down New Paths

“Making new decisions,” a West African proverb counsels us, “is like putting the roof on a hut: Everyone must bend down and lift together.” The tentative directions for inquiry and policy-making outlined in the preceding paragraphs all merit critique and comment from partner agencies and country representatives. Whatever is done will be more effective if it is optimally aligned with the past experience and future initiatives of others and takes full account of the strengths and weaknesses of previous Bank initiatives and of its “comparative advantage” as a source of support for Adult and Nonformal Education.

Rethinking World Bank Policy and Practice

In Support of Adult and Nonformal Education

Introduction

Adult and nonformal education (ANFE) is a highly diverse subsector, yet one that plays a critical role in the achievement of “Education For All” objectives and in the success of World Bank strategies for Poverty Reduction, Civil Society Reinforcement and Public Health Promotion. It is also an essential ingredient in attempts to promote lifelong learning. ANFE has been inconsistently addressed in Bank programming over the past two decades, despite a relative resurgence of interest in the last five years and a number of signal successes (Abadzi 2002; Lauglo 2001; see also Annex 2: World Bank Support for ANFE).

The initiative described here is designed both to *improve Bank performance in promotion of cost-effective ANFE programming* and to *consolidate the contributions of such programs to the achievement of Education For All and Millennium Development Goals*.

An initial phase of the work conducted during the last trimester of the World Bank’s 2003 fiscal year (April-June 2003) has focused on –

determining and meeting the most pressing needs of the institution’s regional staff with respect to improved ANFE programming;

setting in motion a systematic and stepwise procedure for defining a more coherent institutional approach to the subsector; and

beginning consultation with partner agencies and representatives of interested countries concerning their own experience with effective support of ANFE programs, their perspectives on desirable directions for future World Bank involvements and their suggestions regarding optimal ways of conducting the rest of the policy development process.

The meetings scheduled in June 2003 – one in Hamburg with agency and country representatives and another in London with literacy NGOs – are dedicated to launching the consultation and opening a broad dialogue about World Bank and donor support for adult and nonformal education that will extend over the upcoming year. In the pages to follow, we define the proposed focus of this process, suggest some priority themes to discuss, outline for your examination and critique the strategy envisaged and pose some questions regarding your own experience in this realm. We ask you kindly to prepare elements of response that you could either present at the Hamburg or London meeting or send to us, should you not be able to attend.

Defining the Field

Different types of ANFE are offered by a wide variety of social institutions outside the limits of formal schooling, though often in close complementarity with it. Literacy programs, skills training in business and industry (and in the large informal sector of the economy), public health education, adult civic education and continuing education for adults all constitute examples. The domain of learning covered is therefore wide-ranging, but the varied activities that compose it have some very important common denominators.

- ANFE programs typically target the acquisition of particular skills, knowledge and attitudes by participants and are generally designed both to enhance their individual lives and to improve the situations of their families, their enterprises, associations or communities in some specific fashion.
- The most important common denominator of these programs from the Bank’s perspective, however, and a theme around which the present proposal is organized, is that they contribute in

critical ways to local capacity-building – that is, to helping priority target groups and widening strata of the population to play enhanced roles in decision-making, in management of economic and social service activities and in the implementation of development programs.

- Government is a key organizing force in stimulating and monitoring provision of such programs, but design, delivery and at least a small portion of funding are typically handled as well by civil society associations and/or private businesses.. In fact, the most important role for government in this domain is arguably to elicit, regulate and – where necessary – supplement the social supply and demand forces that ensure an appropriate quantity and quality of learning opportunities to target populations of interest.
- Schools themselves may be sites for ANFE programs that interest other segments of the population, like parents or civic leaders¹ -- or that are addressed to school-age children outside the framework of the official diploma-sanctioned curriculum, as is the case of 4H or Scouting programs in many countries.
- Though most adult education falls into this domain of learning, ANFE does not solely concern adults. Programs for *street and working children*, alternate means of delivering basic education to *young refugees of war or disaster*, and vocational training offerings for *unemployed youth* represent other pertinent examples of nonformal education.
- All such programs are implicitly if not explicitly complementary to formal schooling (or remedial to its absence). Nearly no one goes directly from school to job or community without some instruction designed to facilitate the transition, and ANFE activities often provide the guidance required to put new learning to use. ANFE programs may also serve to channel people back into sequences of formal instruction or to replace them, where none such are available.

The ANFE domain thus *surrounds the institutions of formal schooling in developing countries on all sides*, offering crucial avenues for linking them to the economy and society as well as a means for extending the work that they can do.²

Literacy and basic education: An important piece of the pie

Literacy promotion among adults and poorly-served groups of children and youth constitutes one dimension of ANFE – a very important part of the picture that is sometimes mistaken for the whole. Literacy and numeracy in fact intersect the work of ANFE promotion in two critical ways. First, there are numerous adult (and adolescent) literacy programs in developing countries that add something useful to the overall effort to achieve basic education for all. Second, even ANFE programs that are primarily concerned with other dimensions of beneficiary empowerment and technical knowledge improvement – like public health programs, agricultural extension efforts or civic education initiatives – sooner or later run up against the barrier imposed by low levels of literacy and must include some means for addressing the problem.

The learning needs of adults (and of unschooled adolescents) do not always begin by or require literacy – and they often go considerably beyond it, including new knowledge in realms like health, human

¹ ..initiatives therefore often termed “community education.”

² In industrial countries, ANFE is in fact no less important, comprising the vast realms of “human resource development” (HRD: staff or employee training in business, industry and the public sector), varied types of continuing professional education and lifelong learning, and extension or civic education activities in addition to adult basic education and literacy. Resources devoted to HRD in the United States last year, for example, reached nearly 80% the sum total of all higher education budgets in the country and had increased nearly six-fold in the preceding two decades. The annual survey of official HRD budgets by *Training* magazine pegged these at \$55 billion in 2001, up from \$8.4 billion in 1982 (*Training* 2001), but estimated expenses of all corporate “human resource development interventions” to be in excess of \$200 billion (cf. Bierema 2000). In the same year, the total of college and university budgets was estimated at \$260 billion (NCES 2001).

rights, agriculture, management and information communication technology (ICT) that entail varying types and amounts of literate competence (World Bank 2002c). The general realm of ANFE, like that of primary schooling itself, is probably better covered by the term “basic education” (see Box 1), though this term misses the more advanced forms of training that build on basic learning and respond to particular development and human welfare needs.

Box 1. Basic education

Basic education (BE) for children, youth and adults, as defined at Jomtien and Dakar is really about the right to have one’s basic learning needs (BLN) met. This right is met:

- in various **settings** (home, community, school, out-of-school educational, cultural and recreational centers, workplace, mass media, everyday life and activities);
- by various **agents** : family, local and broader community, State/government, civil society (including *local associations* such as rural cooperatives, PTAs, etc.), and the market;
- through various **means**, including education (formal, non-formal and informal) and training, self-directed and experiential learning, making use of both traditional and modern media, face-to-face and distance modalities; and
- **throughout life** that is, not just during a specific period in the life of an individual, because BLN are numerous, they change over time and must be updated as realities and knowledge also evolve.

From Torres, 2002

Literacy and numeracy nonetheless constitute extremely important “technologies” for enhancing basic education and training. They also represent a useful (if somewhat slippery) “metric” or demographic indicator of progress and a shared concern of ANFE and EFA initiatives. One can certainly learn new things and acquire new skills without literate competence. In some programming situations and local development contexts, it makes most sense for all concerned to begin with empowerment issues or livelihood-related dimensions of training before introducing some form of literacy acquisition or consolidation. But sooner or later, absence or deficiency of literate and numerate skills places a definite ceiling on the effectiveness and scope of new learning and must be addressed.³ A further discussion of the current situation of literacy worldwide and of factors that World Bank policy should take into consideration is presented in Annex 1.

Objectives

The principal objective of the work program envisaged for FY04 (July 1, 2003 – June 30, 2004) is **to enhance the effectiveness of World Bank programming in support of Adult and Nonformal Education (ANFE)** in a variety of developing countries and **to consolidate the contributions of these diversely-sponsored activities to Education for All, Poverty Reduction, Civil Society Reinforcement and Public Health Promotion.**

Additional operational objectives include the following:

- a) Involve key stakeholders at both central and field levels in the determination of appropriate strategies.
- b) Identify and begin to bridge the most important research gaps with respect to the dynamics of successful adult and nonformal education programs
- c) Make optimal use of the intersectoral capacities of the Bank and of its experience with institutional and financial policy to define new areas of comparative advantage for Bank intervention in the

³ In a number of functional situations, in fact – like assumption of marketing and credit functions – needs for numeracy may be prior to those for literacy *per se*.

ANFE sector, particularly with respect to promotion of conditions that create learning incentives for local actors and that enlist civil society in delivery of learning opportunities and resources.

- d) Build the capacity of developing country institutions to address the same issues.
- e) Support emergence of new elements of consensus among donor partners regarding criteria for successful investment in ANFE programming.

In a longer-term perspective, the proposed activities should help concerned countries to upgrade their educational systems by

- effectively stimulating supply of new learning opportunities where they are most needed; and so
- more successfully meeting the critical basic learning needs of their citizenry.

Relevance to Critical Development Concerns

Adult and Nonformal Education programs condition the effectiveness of government- and donor-supported efforts to achieve the objectives of Education for All, Poverty Reduction, Civil Society Reinforcement and Public Health Promotion in a variety of ways. Examples are given below which illustrate both the diversity of these services and some of their common denominators.

Education For All

The goal of Education For All cannot be achieved by formal primary schooling alone in the next two decades. ANFE initiatives lend critical support and provide key complementary resources to the overall EFA strategy by providing a means for

- offering basic education and literacy programming to underserved and hard-to-serve populations;
- providing an alternate avenue to formal schooling wherever official mechanisms for crossover and equivalence are provided;
- enlisting parents in more effective support for their children's education and increased local funding of education;
- rendering primary schooling itself more participatory, locally-directed and effective through empowerment and training of parents and other stakeholders for school management; and
- developing complementary vocational training and local income generation activities that provide employment and knowledge application opportunities for school leavers.

At the same time, ANFE programs serve in these ways to *link schools to communities and to local labor markets and economies* and to *mobilize additional local energies for the educational enterprise* (Ahmed & Carron 1989). They offer a way of transforming "Education For All" into something more like "Education By All" and of balancing the important but heavy supply-side emphasis of EFA with a greater focus on the local applications to which new knowledge can be put and the ways in which learning -- or "intellectual investment" -- becomes self-directed and self-sustaining. Finally, the lifelong learning dimensions of ANFE offer a means for facilitating continuing primary, secondary or even higher education among those who have acquired the basics but missed the opportunity for further learning and the chance to stay abreast of a changing economy.

Poverty Reduction:

ANFE programs often constitute the best means for making local poverty reduction and economic development efforts -- whether in agriculture, natural resource management, small industry or credit intermediation -- more participant-driven, cost-effective and self-managed (Oxenham et al. 2002; Easton et al 1998). Staff in these sectors increasingly recognize that program objectives cannot be durably attained without true local "ownership" of initiatives and related dispositions for capacity-

building – yet these are results that primary schooling alone cannot ensure. In addition, nonformal education, literacy and training efforts may be highly instrumental to accomplishment of a series of related goals:

- *Technology transfer*: How to disseminate innovation and ensure that technologies used in economic development are both consistent with best practice internationally and appropriate to local contexts remains a major challenge – and one that is often best addressed through effective (and participatory) nonformal training of stakeholders (Sidikou, 1994).
- *Indigenous knowledge* – Incorporation of existing knowledge and traditional science into development strategies in fields like agriculture and health constitutes a frontier only now being explored and a major factor in promoting both the efficiency and the level of popular acceptance of innovation. ANFE training programs have frequently constituted media for “inventorying” and codifying this local knowledge, itself often embedded in local languages to which literacy programs give voice.⁴ The World Bank is putting increased emphasis on the incorporation of indigenous knowledge into development programming (e.g., World Bank et al., 2002).
- *Local capitalization of resources* – Effectively promoting growth with equity entails transferring responsibility for program management into local hands and reinvesting surpluses at this level in order to ensure genuine “ownership” and sustainability of initiatives. The key variable in such strategies is locally-supervised *capitalization* – that is, the accumulation and reinvestment *under beneficiary control* of the resources (intellectual as much as financial or material) that give local actors greater control of their own future and increased margins of maneuver in building their own economies... as well as enhanced ability to articulate and refashion their own cultural tradition (cf. Oxenham et al. 2002; World Bank 2001; Easton et al 1998; Belloncle, 1982).
- *Economic equity* – If decentralization and local management policies are to benefit the poorest or at least the mass of citizens at the local level, then means must be deployed or frameworks created so that resources, entitlements and functions “penetrate” to their level and are not monopolized, as is only natural, by those already holding power locally: men, the upper classes and the dominant ethnic groups (WB 2002e). Social investment funds are one example of strategies that help the poor “capitalize” themselves – and that require acquisition of new skills and knowledge on their part. “Empowering” adult and nonformal education – that is, programs that blend development of new technical capacity with enhanced understanding of the stakes and options – is a prime means of promoting such investment.
- *Diffuse effects of literacy and basic education* – In addition, correlational studies at the macro level repeatedly suggest that literacy of parents is closely associated with health and successful schooling of children, especially girls (see Aoki et al. 2001). Acquisition of literacy can lead to other dimensions of improved quality of life like broadened communication and more effective political participation. ANFE programs put these outcomes within the reach of motivated adults who have insufficiently benefited from formal schooling or received a low quality version of it.

In these multiple respects, therefore, adult and nonformal education programming provides critical support to poverty reduction efforts (World Bank 2001).

Civil Society Reinforcement

In recent years, the Bank and other donors and international institutions have awoken to the central importance of social capital, institutional capacity building, the reinforcement of civil society and the perfection of local governance in ensuring growth with equity and durable local development. At least

⁴ In fact, over the last few decades, literacy programs have often served as the “crucible” where teaching methods and materials in local languages now being adopted by formal schooling – as well as local language publishing capacities now increasingly useful to development and extension agencies -- were first developed (Easton 2000). Documentation on the Bank’s newly expanded activities in support of indigenous knowledge mobilization may be found at <http://www.worldbank.org/afr/ik/index.htm>.

four issues in this domain are closely related to the foregoing and seem critically important to Bank policy regarding ANFE:

- *Democratization and popular participation* – Though social and political systems vary across the developing world, ensuring substantial citizen participation in decision-making, political choice and resource management is an emerging common denominator concern (World Bank 2002e). It is at the same time a goal that requires learning new behaviors and acquiring new skills and creates a recurrent demand for training and adult education.
- *Decentralization and local capacity building* -- It is increasingly recognized that effective decentralization (or, more accurately, an appropriate balance between central, regional and local functions)⁵ is a condition *sine qua non* of the sustainability and impact of development programs. The principle of *subsidiarity* -- that is, the execution of decision-making and management functions at the lowest level where the requisite competence exists or can be nurtured – requires a renewed focus on the reinforcement of individual and institutional capacity at the local level (Gruksy 2000).
- *Constitution of social capital*: The institutionalization of networks, associations and other means of affiliation of local actors for economic and social purposes – outside (though in cooperation with) government structures of regulation and hierarchical supervision – and the accumulation of procedural and technical knowledge in these interstices of social life have received greater attention in recent years as a crucial supportive condition for local development (Dasgupta and Serageldin 2000). They are nurtured to a great extent by a healthy practice of continuing education and training.
- *Information and knowledge management*: Local actors cannot take effective economic and social initiative in an increasingly interrelated world without good and current information on trends and conditions in their environment and without building and managing a knowledge base for their activities. Developing these skills implies some variety of literacy and training.

Each of these dimensions of the reinforcement of civil society requires in turn a solid underpinning of continuing education.

Public Health Promotion

Public health campaigns in general, and the effort to overcome the HIV/AIDS pandemic in particular, are arenas where “buy-in” from target populations, their acquisition of necessary knowledge and skills and their active participation in eradication efforts are absolutely essential. Experience demonstrates that provision of information by itself, though one vital function of both formal schooling and ANFE programming, is not sufficient: those affected must “take charge” (Okonmah 2000; World Bank 2002a, 2002d, 2002f). ANFE initiatives – and especially those already linked to empowering outcomes in poverty reduction and civil society reinforcement – provide favorable venues for this key evolution in the public health effort.

Core Concerns and Issues of Focus

The close relationships among the different domains of ANFE impact cited above bring out one additional key characteristic of these programs: They not only constitute means for upgrading the technical capacities and development-relevant knowledge of those no longer, never or not yet in school – who represent, at any given moment, the majority of the population – but they also can provide critical *avenues for “democratizing” the work and ensuring effective local participation in multiple sectors of local development.*

⁵ Decentralization is in fact as much a question of identifying and institutionalizing an appropriate division of labor among central, regional and local authorities as it is one of transferring functions into local hands per se. In addition, it takes a variety of forms (like deconcentration, delegation and devolution) well analyzed in Uphoff (1986), some of which create more supportive conditions for local training than others.

In fact, one important common denominator running through all the examples of the role of ANFE programs in achieving development goals cited above is that *they serve to build the capacity of local actors and to help them gain the skills, knowledge and abilities required* for management of new resources and local direction of development efforts. ANFE programs of course meet many other learning needs in urban as well as rural settings, and they may certainly offer training at the national or regional as well as the community level.⁶

Yet this function of *local capacity building* is particularly critical for all who are concerned with overcoming poverty and empowering the poor. It is critical because it can spell the difference -- or ensure the transition -- between intervention that is purely external and sustainable local initiative, between largesse that is ineffective because unrenowable or ungeneralizable and a pattern of local capitalization that multiplies the effects of external support.⁷ But it can only do so if measures are taken in neighboring sectors to give local actors -- individual and institutional -- the responsibility and the access to seed capital that makes effective empowerment possible. And to this we shall return.

Adult and nonformal education therefore covers a wide spectrum of programs with a wide variety of effects; and it represents *de facto* a major segment of the overall educational system in countries where the World Bank is engaged. The natural diversity of ANFE is both a source of richness and a challenge to efforts intended to enhance the contribution of this sector to Education for All and to the achievement of Millennium Development Goals. Targeting and focus are critical to ensuring the feasibility and effectiveness of any such endeavor.⁸ Much of the rest of this document is thus devoted to examining where the World Bank might best concentrate its own efforts in order to ensure maximum leverage and impact.

Support Needs of ANFE Programs

Any strengthened and revised approach to World Bank support of ANFE should focus on the areas where the greatest deficits and needs lie -- and, among those, the areas in which the Bank itself has a true comparative advantage for producing positive effects.

Assessing the importance and nature of current support needs in the ANFE sector is one of the objectives of the work that we hope to accomplish -- in collaborative fashion -- over the next year; but some preliminary observations are in order. It seems to us useful to analyze and articulate these needs in three general categories that offer at the same time one way of representing the dynamics driving that drive such programs:

- *Supply-side issues* concern effective and good quality provision of the various resources required for successful ANFE work: adequate funding, skilled staffing, curricular material, facilities, necessary equipment, good monitoring and supervision, appropriate evaluation and research services, etc. Factors like these make possible improved service delivery in the field.
- *Demand-side issues*: These have to do with developing the commitment to literacy and training among target groups. The goal is to elicit and strengthen what economists would call

⁶ "Local capacity building" may itself require substantial training of actors at other levels, just as effective local government requires well-trained regional councils and deliberative bodies. The word "local" is finally relative.

⁷ As such, they represent the subsector of the overall education system that maintains the most substantial bridges and linkages with its socio-economic environment and that can perhaps best help the institutions of schooling overcome their proverbial isolation.

⁸ At its far end, ANFE of course shades into the immense background domain of "informal education" (IFE) -- or the largely unstructured kinds of daily learning in which everyone may engage, to a greater or lesser degree, throughout the lifespan. Informal education accounts for much of lifelong learning; and it varies in content and intensity with the previous experience of the individual and the quality of the learning environment. It is far too broad a domain to target directly through the sort of institutional policy envisaged here but registers many of the positive "spillover" effects of successful formal and nonformal education initiatives. In fact, since Coombs (1968), the three domains of education (FE, NFE and IFE) have often been pictured as concentric circles -- formal education at the core, nonformal surrounding it on all sides and interfacing with work and community, and informal education permeating that entire environment.

“effective demand” – that is, the disposition and ability not just to engage in training and master new skills but also to mobilize the resources necessary for underwriting the activity to an increasing degree.

- *Linkage issues* have to do with the ways in which adequate supply is coupled to strong demand and therefore concern both the macro planning of interventions (targeting them on areas of effective demand) and the design and administration of actual programs (carrying out training in such a way that it meets real needs and enables participants to assume new responsibilities).

To move ahead in consideration of optimal roles for Bank support, it will help to look at each of these categories a bit more closely.

Supply-side issues

There are numerous categories of needs on the “supply side.” Among the most important are the following:

Finances – Always present, financial needs are nonetheless different and perhaps less massive in the ANFE arena than with respect to the primary schooling dimensions of EFA, given lower unit costs and – especially – the fact that delivery is increasingly handled by a variety of civil society associations, NGOs and enterprises. These can often link the training to local economic activities that provide some of the resources required. Outside funds often constitute a critical complement and leveraging factor, however.

Organization, Administration and Coordination – Needs in this area are appreciable, given the disparate and far-flung nature of ANFE delivery. How best to handle out-sourcing, decentralized and private provider configurations and how to optimally conduct evaluation, monitoring and quality control are among the key issues to be resolved. Studies (e.g. Okech et al. 2001) have repeatedly shown that program results are quite dependent on quality of implementation. In addition, perfecting the interface between educational providers and the many other organizations and sectors that require capacity building is a major challenge.

Technical Support - Appropriate technology for instructional delivery in ANFE programs and for development of instructional materials are a prominent need in many cases, as are training programs for upgrading the capacities of ANFE personnel. ICT, electronic technology and distance learning open new vistas and opportunities in this realm.

Research and Knowledge Creation – The dynamics of ANFE programs – notably linkages between inputs, processes and outcomes – are even less researched and understood than those of formal schooling in developing countries. Needs in this domain range from psycho-cognitive studies of literacy acquisition and retention under different environmental conditions (Abazdi 2002) to socio-cultural ones of environments that favor learning (Heath 1999; Easton 1989) and R&D endeavors targeting development of new and locally-adapted instructional procedures. A premium should be put on developing national and local capacity to carry forward such research.

Interventions and support on the supply side are designed to increase the quantity and quality of appropriate learning services provided to target populations and to enhance the ability of the network of in-country providers to do so on a durable basis.

Demand-side issues

To educators, demand-side issues sometimes seem counter-intuitive. Isn't education a universal right and need? Don't people everywhere want it? Doesn't demand far exceed supply?

A variable quantity.

In fact, it is our experience that demand for different forms of education – including ANFE -- varies (a) with perceptions of the quality of the program in question and (b) with perceptions of the “instrumental

value” of the new knowledge or certification acquired – that is, the uses to which it can actually be put. This observation in no way negates the importance of other more transcendent virtues of education – like enlightenment, empowerment and personal growth – quite the reverse. They account for some of the most lasting impacts of educational experience. Nonetheless, for people with limited means (and therefore the majority of the groups that concern us), organized learning must typically be linked to instrumental uses that make the investment of time, if not of one’s own resources, worthwhile and manageable – whether these outcomes take the form of monetary returns, social advancement or specific cultural and religious benefits, in whatever proportion these are combined.

Demand for formal schooling is, of course, usually increased by a sizeable “charter effect,” thanks to the access that its diplomas potentially give to employment and opportunities for further schooling as well as to enhanced social status. Yet even demand for formal education -- in developing countries as in industrialized ones – varies markedly among different types of education as a function of their currency on the job market and of a series of other “benefit” factors. Diplomas in information science are at a premium nowadays in many countries because of these kinds of opportunities.

Moreover, demand for formal schooling can shrink as well as grow: interest in primary and secondary schooling (and enrollment rates) dipped noticeably during parts of the last two decades in subSaharan Africa (Colcough 1998) when school diplomas and public sector employment were uncoupled from each other by structural adjustment and constricted state budgets..

Demand for ANFE and literacy

ANFE programs, on the other hand, are not “chartered” or “diploma-ed” in the same sense as formal education – that is, they generally do not give certified entitlement to higher levels of training or serve as widely-recognized credentials in the formal labor market. These programs therefore depend mightily for their energy and relevance on opportunities for use of lessons learned in neighboring sectors of local society – like rural development, credit and banking, information, local governance and health.

In a relatively prosperous environment, resources and entitlements for individual and collective uses of new knowledge are plentiful, and nonformal education may proliferate in a great variety of forms. In more impoverished environments, opportunities for sufficiently remunerative uses of new knowledge may be very restricted unless the institutions – local and, especially, supra-local – that hold most resources and exercise authority in the various dimensions of social life decide to change the rules of the game and to structure means for granting local players new authority and for assisting them in controlling and capitalizing modest new resources. Under these circumstances, the instrumental value of ANFE depends very much on a supportive policy environment in neighboring sectors that creates incentives for learning and possibilities for remunerative or status-enhancing applications of new knowledge.

The emphasis on “post-literacy” programming that developed in the 1970s and has enjoyed periodic currency ever since then, for example, arguably amounts to a recognition that, in resource-poor environments, the simple fact of becoming literate, particularly in a non-dominant script or language, does not *ipso facto* create enough uses for that skill to compensate the effort required to master it. Resource-poor environments are often largely “illiterate” ones where there is little to read and where social and commercial relations have been set up over the years on the assumption that the majority of the population cannot read and write and will not have access to the capital or power required to change their circumstances. These structural characteristics of the environment do not change just because a cohort of young people or adults acquires literate competence.

It follows that *building up effective demand for ANFE programs means ensuring that ample opportunities for the use of new knowledge and skills are in place*, identifying and connecting with those fields of application or – if necessary and possible – helping to create them.⁹ Yet providers of

⁹ In economic terminology, “effective demand” literally means demand by someone with the means to pay for the service or product in question—and it is distinguished, therefore, from the notion of “need.” We may be

educational services *cannot*, with rare exceptions, *create fields of application for the new knowledge participants acquire all by themselves* (which is one of the lessons of experience with post-literacy programs). They must be connected in one way or another to environments or to other systems where the new skills are put to use – organized possibilities for further training; new opportunities to invest and manage resources; new arenas of employment; enhanced social, political or religious functions that require increased competence; and so forth. And these fields of application principally derive from and depend upon other sectors of local development and social life – like small business investment, health service delivery, community or regional governance... and, yes, primary schooling.

Underlying concerns

Though situations in resource-poor environments across the developing world are much too complex to characterize by general rules, it is our experience overall that policies of decentralization, local capacity building, and locally-controlled investment – if effectively implemented – are *the factors most likely to create and sustain uses for new knowledge* under such conditions. They enable and impel a variety of local actors to assume new functions, functions which in turn require new knowledge and skills. For example --

- Under a decentralized pattern of governance, groups of citizens typically need to involve themselves in administrative activity and oversight to a much greater degree than in a more centralized or distant one.
- In a public health program where active use is made of local paraprofessionals and of indigenous knowledge, training needs are much higher than under an entirely hospital- and doctor-centered approach.
- In a banking system where micro-credit is made widely available for local entrepreneurs and training is provided to help them manage their affairs, repay their loans and reinvest their proceeds there may be incentives to capitalize resources, learn new trades and acquire related knowledge that just wouldn't exist if access to credit were more restricted or less well structured.
- In an educational system where those having acquired requisite levels of literacy, numeracy and other basic competencies through nonformal education can sit for exams that give them access to further cycles of formal schooling – and where language policies smooth the transition – there may be motivations to perfect and advance learning begun outside official schooling that are absent from environments where nonformal and formal education are strictly segregated.

All these examples – and others besides – hinge to a critical extent on *policies of institutional practice and on social regulation* adopted in sectors other than ANFE itself: those sectors that constitute a large part of the field of application for new knowledge. Though applications and requirements are different in each sector, an important common denominator in impoverished communities and those emerging from that state seems to be *local capacity building*.

Ensuring or bolstering demand for ANFE services therefore means, at least in part, influencing these institutional practices in order to help create a better quality learning environment and a social configuration that makes better use of new human resources.

convinced that a given person or group “needs” better medical care, but if they do not themselves have both the desire and the means to procure it, there is no effective demand, in the strict economic sense of the word.

This may seem a heartless distinction, but it does encapsulate an important element of truth, particularly for educational programs. If people cannot use proposed educational services in practical ways that enhance their well-being and that begin, at least, to endow them with the means to sustain educational activity on their own, then our attention should probably go to improving the opportunity structure for applications of new knowledge before it goes to doling out additional educational services. As the Malian peasants were wont to say to agricultural agents proposing new farm equipment to cultivate impoverished soils and supply weak markets, “The tortoise loves to dance – but he just doesn't have the legs!”

Linkage issues

ANFE strategies, nonformal education programs and literacy schemes are undertakings designed to link educational supply to effective demand. By that, we mean that they should focus provision of appropriate and good quality instructional services on environments, situations and groups where new knowledge is very much needed and where it can be used – at least some of the time – to generate some of the new resources and additional social capital that will help support the perpetuation and spread of learning. The supply and demand sides of the educational equation are like two batteries or two opposite sources of electrical potential. For the current to flow and the program to take life, the poles must be securely coupled. High caliber supply without effective demand is largely wasted. Acute need or strong demand for training without reliable and good quality is equally futile.

The challenge is *to effect the junction*. At the “macro” level, this means enhancing the quality of supply (institutional capacity) and the level of demand (density of opportunities for rewarding application of new knowledge) while carefully locating fields for intervention between the two (linkage). At the micro level, it means supporting programs that are adroit at locating and cultivating fields of application for new knowledge and at fashioning out of the supply of available resources sequences of learning activity that prepare participants for new roles.

Overall, as we survey the supply and demand dimensions of the issue as well as concerns for their linkage, it appears that effective demand side initiatives tend to be the most neglected in programmatic efforts to support and develop ANFE – both because they seem counter-intuitive to many and, more pragmatically, because *ANFE providers seldom have the means to access or deal with issues of institutional policy in domains like agriculture, health, farm credit and marketing, natural resource management, administrative governance or even formal school admissions* that largely determine the opportunity structure for the application of new knowledge in resource-poor areas.

Governments, many bilateral and multilateral donor institutions and some NGOs *do* potentially have this latitude, however, insofar as they support and supervise activities in many of these areas at once; and a good deal of “hidden” ANFE takes place within ministries and organizations concerned with these other realms of development. Still, with the exception of a few innovative initiatives and a mixed heritage of “integrated development” now largely abandoned, educational programming – and ANFE support efforts in particular – tend to remain cloistered away from the other dimensions of investment and policy that are so critical to their success.

Role of the World Bank – and Other Donors -- in ANFE Promotion

Even a very attentive analysis of the current situation and support needs of ANFE programs and of their potentials for contribution to EFA, to poverty reduction, to improved public health and to strengthening civil society does not necessarily indicate *what role organizations like the World Bank should play in this arena*, given their own particularities and sources of comparative advantage.

The central purpose of the activities outlined here – which began in March of this year and will continue through June 2004 – is to answer this question through examination of lessons learned in ANFE support work in recent years, targeted research on related topics and consultation with partners at international, national and field levels.

To map recommendations for World Bank policy and practice against the picture of ANFE programming and of neighboring domains of development that will emerge from the proposed exercise, one must begin at the beginning -- asking again *what kind of an institution the Bank in fact is and what its own domains of comparative advantage may be*. By “comparative advantage,” we mean those domains and types of intervention where the World Bank can make best use of its own particular strengths and most helpfully complement the activities of other stakeholders.

We are convinced that the Bank can play an extremely positive and greatly needed role in ANFE support – as it has at particular junctures in the past – but are equally persuaded that, as the poet says, “new occasions teach new duties, time makes ancient good uncouth.” It will take an attentive examination of the current state of ANFE, a good understanding of the current potentials and

constraints of the World Bank, and a generous measure of consultation with stakeholders from international to local levels in order to devise a new prescription. Without entirely anticipating on the work that must take place over the next year, we suggest that the following perspectives be taken into consideration in carrying out this task:

- First, the Bank is not a major ANFE provider at the local level. Its role is supportive, both financially and technically. Governments, nonprofit organizations and local associations in the countries concerned are the appropriate actors to fulfill roles of design and delivery. However, as a multilateral financial institution with a history of development assistance, the Bank can both enable educational provision and access levels of policy to which ground-level actors unfortunately seldom have access.
- Support needs for successful ANFE programming include initiatives on both the supply and demand sides of the equation, as well as those devoted to linking the two.
- The World Bank is one leading example of an institution that invests and intervenes on both sides of the ANFE coin – yet in its case as well, there has been relatively little cross-sectoral effort to link educational programming (supply) with measures in neighboring fields of development that would help remodel opportunity structures for the application of new knowledge in resource-poor environments and help ensure a return to personal and social investments in learning (demand).
- Finally, all recommendations for new policy or practice at the World Bank must take account of changes currently underway in its own *modus operandi*, including the progressive shift from project to program funding, and of the best and latest understanding of its relations with client governments.

Proposed Methods of Inquiry and Consultation

The perspectives advanced in the foregoing pages are, at most, working hypotheses and starting points for the inquiry to be carried out next year. Readers may very much disagree with one, more or all of the assertions made above. (There are points of healthy points of disagreement among the authors themselves!) We hope that there will be many rejoinders. The purpose of the longer-term activities proposed in this paper is precisely to solicit reactions and suggestions and to examine the question of the “comparative advantage” of the World Bank – and of other donors – in the light of existing research, the new studies being carried out simultaneously and the viewpoints of a whole range of stakeholders.

Any refocused and strengthened approach to ANFE within the World Bank must grow out of the institution’s own experience and be based on several key sources of insight:

- To begin with, the viewpoints and needs of World Bank regional staff working in these areas.
- Next, the “state of the art” – that is, best practice and confirmed knowledge from other available research in the field, with an emphasis on the areas most central to the Bank’s comparative advantage.
- Third, careful consultation with agency partners and with practitioners and involved institutions in client countries that have a stake in Bank policy and a reservoir of valuable experience.
- Fourth, analysis of procedures within the Bank itself that may need to be revised in order to optimally support ANFE work in the field and promote its contribution to the achievement of Education for All and Millennium Development Goals.
- And finally, new studies of critical topics where current knowledge is deficient that might be commissioned and carried out under Bank or other partner auspices, but with optimal

participation/direction by researchers and research institutions in concerned developing countries.

We have adopted a four-track strategy in pursuing this agenda, though a number of elements of the approach and the program remain to be defined and would benefit enormously from consultations with partners and stakeholders like those scheduled for Hamburg and London:

- I. Review *lessons of experience* from ANFE programming by governments, other donors and the Bank over the past two decades through examination of available documentation and interview with knowledgeable parties at all levels.
- II. In collaboration with researchers in concerned countries, *design and implement applied research studies* on topics identified by Bank staff and stakeholders as priority themes for investigation and important inputs to the policy inquiry.
- III. *Consult with representatives of partner agencies, concerned countries and field projects* to solicit the fruit of their own experience with ANFE policy issues and their recommendations regarding future directions for the World Bank in this domain.
- IV. Investigate within the Bank itself opportunities for (and obstacles to) new directions in ANFE policy, plus modifications in procedure that might be required to make them possible.

First track: Lessons learned

As in any such endeavor, a foundational step is to ground the inquiry in a careful review of lessons learned from experience, as they are recorded in the published literature on ANFE and the mass of project reports and documents available at different levels. Thankfully, this may be in part a “review of reviews,” as a good deal of spade work has been done by others (e.g., Oxenham [forthcoming]; Lauglo 2001; and CONFINTEA V reports) to draw up a balance sheet of previous interventions. Activities under this track overlap in important ways with the stakeholder consultation discussed in third position below.

Second track: Targeted research

An initial list of priority research themes was developed through consultation with regional staff within the World Bank during a series of meetings and working sessions held in the last trimester of calendar year 2002. The results of these discussions are portrayed in Table 1 on the next page.

The topics listed are more than can be addressed by World Bank resources in the course of the policy development process envisaged here. It is likely that some studies on these themes recently have been, now are being, or soon will be undertaken by other sources of funding, and there is everything to be gained from collaboration and cross-fertilization among those involved. Two topics were selected by World Bank staff as initial foci of inquiry for field research: (1) **costs and financing of ANFE**; and (2) optimal **management schemes for ANFE provision**. A third – **local capacity building policies and practices** across countries and funding agencies – was adopted for initial investigation due to its relevance to stimulation of demand for literacy, nonformal education and training.

An inaugural set of studies on the first two themes is being carried out by researchers in Bangladesh and Burkina Faso. Initial results will be ready for presentation at the meeting in Hamburg, as will the fruit of our foundational inquiries into the local capacity building theme. It is envisaged to continue with a second phase of research on all three themes next year – extending them to additional countries – and to add one or two new themes to the set of topics, though the exact strategy to adopt in this regard will be influenced both by final results of the first phase efforts and by the advice and counsel of stakeholders.

Third track: Stakeholder consultation

Consultation with stakeholders and partners at a series of levels is a critical part of the process, both because they have an outside view of World Bank practice and because many have long experience of their own in supporting ANFE which can provide guidelines for the Bank effort and indicators or where

Table 1: Results of Consultation with Regions on Short-Term Needs

Priority Theme	Current Status
<p>Costs and financing</p> <ul style="list-style-type: none"> Better analysis of per completer unit costs, cost-efficiency, and cost-effectiveness in different forms of ANFE. Work towards in-country “cost consciousness” and capacity building in economic analysis. 	<p>Initial framework and study undertaken by consultant. Draft due 12/02..</p> <p>Case study of financing in decentralized setting (Indonesia? Nigeria? India?)?</p>
<p>Literacy assessment</p> <p>Improved techniques for estimation and assessment of literacy levels and basic education outcomes.</p>	<p>Being implemented as a separate project, in collaboration with UIS and Statistics Canada.</p>
<p>Monitoring & Evaluation</p> <p>Improved methods for monitoring and evaluation of programs.</p>	<p>Pilot program being conducted by UNESCO. Follow-up with them on lessons learned, etc.</p>
<p>Adult learning and retention of skills</p> <p>Better understanding of factors governing acquisition of basic education and retention of literacy among different categories of ANFE participants.</p>	<p>Need to better focus research in the area and start funding longitudinal studies on the ground with other partners.</p>
<p>ICT</p> <p>Greater understanding (and improved use) of information and communications technology (ICT) in instructional delivery and development of instructional materials.</p>	<p>Collaborative efforts with WBI focusing on Health (HIV/AIDS) to be discussed.</p>
<p>Post-literacy and literate environment</p> <p>Successful strategies for post-literacy programming and support for literate environment (e.g. community resource centers) and generation of related print materials in local languages.</p>	<p>Showcase best practice (e.g., learn from and adapt the Community Resource Center [CRC] program supported by UNESCO Bangkok office).</p>
<p>NFE management</p> <p>Optimal management of decentralized or delegated delivery of NFE programs for specific priority target groups. Role of central and local governments, civil society, and private sector.</p>	<p>Senegal case study on out-sourcing now ongoing. Envisage study of --</p> <ul style="list-style-type: none"> different NFE models targeted at particular groups (e.g., out-of-school youth) or potentials of training/empowerment for PTAs and communities in planning, management and monitoring of educational activities.

its comparative advantage may, and may not, lie. Initial meetings this June in Hamburg with bilateral and multilateral agency representatives, NGO personnel and country representatives should provide an excellent forum for airing the topics broached here and discussing optimal methods for carrying out consultation throughout the upcoming year.

A key part of this strategy will consist of a series of workshops or “hearings” in selected countries (e.g., one per region) between October 2003 and February 2004 to present the results of all activities and inquiries to date and solicit the viewpoints of educational and development agency authorities as well as of field staff regarding advisable directions for World Bank policy. Representatives of ANFE-experienced institutions in neighboring countries will be invited to participate in these workshops in “hub” locations, and the fruit of the deliberations in each region will then inform final recommendations to be made to the Bank.

Fourth track: Dialogue within the World Bank

Recommendations should grow not only out of insight into best practice in the design and field administration of ANFE programs but equally from perceptions of changes in World Bank policy and internal practice that would make its support more effective. To facilitate this necessary task of self-analysis and self-critique, dialogue and inquiry will be carried out within the Bank itself in parallel with the outside activities. They will be devoted to identifying ways in which standard operating procedures and patterns of work and cross-sectoral collaboration within the Bank could and might profitably change to accommodate the new policy directions that the present exercise suggests.

All three tracks should then converge on final deliberations in the early Spring of 2004 and on the preparation of a final report and set of supporting documents for the Bank and for subsequent dissemination to all participating stakeholders.

Recognizing Progress Made and Starting Down New Paths

“Making new decisions,” a West African proverb counsels us, “is like putting the roof on a hut: Everyone must bend down and lift together.” The tentative directions for inquiry and policy-making outlined in the preceding all merit critique and comment from partner agencies and country representatives. Whatever is done will be more effective if it is optimally aligned with the past experience and future initiatives of others and takes full account of their perceptions of the Bank’s strong and weak points, its sources of comparative advantage and disadvantage in support for Adult and Nonformal Education.

The cover letter accompanying this document suggested a brief list of topics on which we hope participants in the meetings 18-20 June in Hamburg will be prepared to intervene -- in Working Groups and/or in plenary – in order to share the fruit of their own experience. Your insights regarding the effective promotion of ANFE, your reactions to the proposals made in the preceding document and your suggestions concerning both the substance and the methodology of the activities envisaged for next year are critically important. If the longest journey begins with a single step, there should be ample opportunity at the encounter that the UIE has kindly offered to host to make that step and more.

Annexes

1. Defining and Measuring Literacy
2. The World Bank’s Support for Adult and Nonformal Education

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