

**What Influences the  
Outcomes of WBI's  
Learning Programs?  
— Evidence from  
WBIEG Evaluations**

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Chaoying Liu

Shreyasi Jha

Tingting Yang

WBI Evaluation Studies  
No. EG06-117

The World Bank Institute  
The World Bank  
Washington, D.C.

February 2006

## Acknowledgments

This report has benefited greatly from reviews Marlaine Lockheed (senior evaluation adviser), Joy Behrens (WBIEG), Philip E. Karp (WBIRC), Monika Weber-Fahr, Shobha Kumar, Veit Burger, Sheila Jagannathan, Atem Ramsundersingh, Han Fraeters, and Andrei V. Tolstopiatenko (WBIGM). The authors also thank Humberto Diaz, Elisabeth De Meuter, and Seth Beckerman for their assistance with formatting and proofreading the report.

WBIEG evaluates learning by staff of the World Bank and activities of the WBI. The Institute supports the World Bank's learning and knowledge agenda by providing learning programs and policy services in the areas of governance, knowledge for development, human development, environment and sustainable development, poverty reduction and economic management, and finance and private sector development. The findings, interpretations, and conclusions expressed in the WBIEG report are entirely those of the authors and do not necessarily represent the views of the World Bank Group, including WBI.

WBI Evaluation Studies are available at <http://www.worldbank.org/wbi/evaluation>

Suggested citation: Liu, Chaoying, Shreyasi Jha, and Tingting Yang. 2006. *What Influences the Outcomes of WBI's Learning Programs? — Evidence from WBIEG Evaluations*. Report No. EG06-117. World Bank Institute. Washington, DC.

Vice President, World Bank Institute	Frannie Léautier
Manager, Institute Evaluation Group	Richard J. Tobin
Team Leader	Chaoying Liu

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## **Acronyms and abbreviations**

AFR	Africa Region
CESI	Community Empowerment and Social Inclusion Program
DL	Distance learning
EAP	East Asia and Pacific Region
ECA	European and Central Asia Region
FGD	Focus group discussion
F2F	Face to face
FY02	Fiscal Year 2002
FY03	Fiscal Year 2003
FY04	Fiscal Year 2004
GDLN	Global Distance Learning Network
LCR	Latin American and Caribbean Region
LIC	Low-income country
LICUS	Low-income country under stress
MDGs	Millennium Development Goals
MIC	Middle-income country
MNA	Middle East and North Africa Region
NGO	Nongovernmental organization
SAR	South Asia Region
WBI	World Bank Institute
WBIEG	World Bank Institute Evaluation Group

## **EXECUTIVE SUMMARY**

In its roles as a broker, facilitator, and aggregator of global knowledge and learning, the World Bank Institute (WBI) champions capacity enhancement for development. With capacity enhancement as its overall goal, WBI's learning activities aim to achieve five objectives:

- Raise awareness of knowledge and information;
- Build skills and knowledge;
- Influence individual behaviors;
- Enhance organizational and institutional capacity; and,
- Influence policy and reform.

The objective of this review is to summarize key findings and identify major lessons learned from the WBI Evaluation Group's (WBIEG) evaluations of WBI's learning activities from 1999 through June 2005.

The central question addressed by this review is what pedagogical approaches and activity features as well as participant characteristics influence the outcomes of WBI's learning events. "Pedagogical approaches" and "activity features" describe what occurs during and after a learning event. We also consider the influence of participant characteristics.

Based on six metanalyses and 31 other WBIEG evaluations, this report summarizes evidence about the influence of pedagogical approaches and activity features on four indicators: quality of the learning event, knowledge building, participant utilization of knowledge, and policy and institutional change. In addition, the report summarizes the influence of participants' characteristics on their perceptions of the learning events they attended.

The review concludes that WBI's learning activities: (a) have largely achieved their objectives of providing high-quality, relevant, and effective products to the Bank's client countries; (b) have successfully addressed the needs of low-income countries; and, (c) can be enhanced by increased use of sound designs and pedagogical approaches.

### **Participants rated WBI's learning activities as being of high quality.**

Surveys of participants in WBI's learning events conducted between July 1, 1999 and June 30, 2004 showed that WBI's learning activities were considered by participants to be highly relevant and useful. However, WBI needs to strengthen its efforts to address participants' learning needs and provide them with new and cutting-edge information.

### **WBI's learning activities were effective in enhancing participants' skills and knowledge.**

Three meta-analyses and two evaluations of learning gains showed improvement in knowledge by participants in all of WBI's learning activities. The increases varied from 8 to 11 percentage points across the activities evaluated.

### **WBI's learning activities had moderate effectiveness and impact on individuals. The impact was pronounced in low-income countries.**

Evidence derived from impact evaluations showed a substantial variation in reported effectiveness and impact of WBI's activities across thematic programs and focus countries. Perceived impacts were stronger in low-income countries (LIC) than in middle-income countries (MIC).

- Participants rated WBI's activities as moderately effective.
- Participants reported that they made use of the skills and knowledge acquired from WBI's activities at a moderate level. The most common areas used by participants were teaching, raising public awareness, and research applications.
- A majority of participants reported a positive influence as a result of WBI's interventions. Comparatively greater influence was observed in the areas of individual work and responsibility, namely teaching, research, and raising public awareness. Influence at the institutional and country levels was less apparent.

### **What pedagogical approaches and features may influence the outcomes of WBI's learning activities?**

- Learning events designed to meet requests from external clients and get partners involved in the design and implementation of learning activities can contribute to effectiveness and utilization.
- Events using an action-learning component increase participants' perceptions of effectiveness.
- Events delivered in a participant's country can boost learning and improve use and effectiveness.
- Events with longer duration can enhance learning gains and improve effectiveness. However, the influence of duration can be complicated by the

type of events and participants. Short activities and conferences can be effective for senior government participants.

- Events designed to be relevant to participants and to their countries may lead to high effectiveness, utilization, and impact.
- Activities providing ongoing support and follow up with participants can enhance and sustain long-term effectiveness and impact.

#### **Who are the likely beneficiaries of WBI's learning activities?**

- Participants with lower precourse knowledge achieved greater learning gains at WBI's learning events than those with higher precourse knowledge.
- Participants with a high level of proficiency with the technical terminology used in the activity perceived WBI's activities as more effective compared to their counterparts, thereby increasing their use of information from the learning activity after returning to work.
- Participants holding high-level positions and working in government agencies reported higher use of their learning, especially in policy and practical areas compared to academics. Participants from research organizations used learning more in the academic area than those from government agencies.
- Participants from LICs reported higher utilization of learning acquired from the activity than those from MICs.

#### **At the strategic level, WBI should:**

- Increase attention to middle-income countries. Evidence across most levels of evaluations showed clearly that WBI learning activities have appropriately addressed the needs of low-income countries but not necessarily those of middle-income countries.
- WBI's Client Registration System (CRS) should be strengthened, and increased effort should be given to ensure the data collected are meaningful, accurate, and comprehensive.
- Promote an organizational culture, training, and incentives that encourage WBI's learning teams to value evaluation.

#### **At the program and activity levels, learning teams should:**

- Review the content of learning activities to ensure their relevance to the recipient countries and to the target population.

- Review the objectives and design of their learning activities to ensure that objectives are specified clearly and address one or more of the following themes: raising awareness, increasing knowledge, or changing behavior.
- Review the current plan for implementation proposed in the program brief to ensure the program component is sufficient to warrant the outcomes expected.
- Select pedagogical approaches that are known to be effective in achieving desired objectives.
- Recruit and select participants with a suitable level of proficiency in the language of instruction and the technical terminology to be used during the event
- Increase interaction and follow up with participants after learning events.

**For future evaluations, WBIEG should:**

- Work with the learning teams to develop improved measures to assess events' quality and outcomes.
- Conduct further analysis to increase the understanding of interactive effects of influencing factors.
- Conduct an analysis of the costs of learning events using different design and pedagogical approaches along with evaluation of their effects.
- Improve the quality of its evaluation designs, methodologies, and data sources.

# 1. INTRODUCTION

1.1 Enhancement of capacity is crucial to attaining the Millennium Development Goals (MDGs). The World Bank Institute (WBI) champions capacity enhancement for development as a broker, facilitator, and aggregator of global knowledge and learning. In doing so, WBI seeks to develop the capacity of individuals, organizations, and institutions. WBI's client learning activities assume that enhanced capacity will promote development.

1.2 WBI delivers courses and seminars on topics ranging from health to fiscal decentralization to corporate social responsibility. Modes of delivery include face-to-face and a variety of distance- and e-learning approaches. Many activities are delivered in collaboration with partners, often from client countries. Learning activities are classified on the basis of their product lines, intensity, and duration (appendix 1).<sup>1</sup>

1.3 WBI's thematic learning programs aim to:

- Raise awareness of knowledge and information;
- Develop individual skills and knowledge;
- Influence individual behaviors;
- Enhance organizational and institutional capacity; and,
- Influence policy and reform.

## EVALUATION OF WBI'S LEARNING ACTIVITIES

1.4 This review summarizes key findings and identifies major lessons learned from WBIEG's evaluations of WBI's learning activities. The review draws on six metanalyses of evaluations (see appendix 2), 31 other evaluations of client learning, results from the periodic *WBI Quality Report* provided to WBI's management, and experience from evaluating Bank staff learning activities summarized in a separate review (Lockheed and Arango 2005). The review's emphasis is on the pedagogical approaches, activity features, and participant characteristics that are related to the quality, effectiveness and impact of WBI's learning events.

1.5 In particular, this report addresses these questions:

- What do evaluations tell us about the quality of WBI's learning events?
- To what degree do these events help participants build skills and knowledge?

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<sup>1</sup> Intensity is the amount of detail provided for a topic.

- To what degree do the events influence individual behavior and contribute to development?
- What participant and course factors influence the outcomes of WBI's learning activities?

1.6 These questions are premised on the assumption that learning and behavioral changes are a function of factors internal to individuals and courses as well as external factors (Ajzen and Fishbein 1980). As an extension of the classic four-level evaluation of training effects, WBIEG examines the determinants of outcomes of WBI's learning activities, focusing on factors at individual, course, and environmental levels (Lockheed 2004). Internal individual factors can include such characteristics as proficiency with the language of instruction or prior knowledge of a topic. Internal course factors that inhibit learning include poor design, lack of relevance to participants, inappropriate level of course content, and methods of delivery. External factors include barriers that prevent individuals from using skills and knowledge acquired from an activity.

1.7 WBIEG's evaluation practices follow Kirkpatrick's (1975, 1994) principles of the standard four-level approach to evaluating training.

**Level 1 evaluations** measure participants' satisfaction with and reaction to learning activities and help identify ways to improve activity design and implementation for future delivery. In WBI, these evaluations ask participants to rate the overall usefulness of their activity and also serve as a performance measure that management uses as a proxy for the overall quality of WBI's learning activities. WBI requires these evaluations for all learning events that last longer than one day, except for conferences.

**Level 2 evaluations** assess the effectiveness of knowledge and skill-building activities through objective tests of learning, with the goal of identifying ways to improve the activity. Such evaluations measure participants' knowledge at the outset and at the end of the activity, using different but equivalent forms of a structured test of the activity content.

**Level 3/4 evaluations** assess how activities influence behavior and whether there are subsequent changes at the institutional and country levels. Level 3/4 evaluations are normally conducted between six and 18 months after the activity. Common WBIEG's methodological approaches include participant surveys, focus group discussions (FGD), and interviews with participants. Box 1 summarizes some challenges and difficulties in conducting such evaluations.

### **Box 1: The challenges of evaluating the impact of learning**

**Cross-country and cultural differences:** WBI programs include participants from many countries or are presented in several countries simultaneously, using videoconferencing or other technologies. Cultural and political differences across countries and participants can have confounding effects. Comparison between countries and participant groups is difficult when so many effects exist.

**Difficult to construct baselines:** Impact evaluations are most effective when an evaluator can detect the impact of an intervention based on comparisons between pre- and postintervention and between cases and controls. All these require a control or comparable group and require baseline data that portray the situation before the intervention. Capacity, timing, and resources often prevent the use of a control group and the collection of such data.

**Program cycles:** WBI's program cycles tend to have long durations, with the expectation that real impact on the ground occurs over time. WBIEG typically conducts impact evaluations one or two years after a learning event, but impacts can occur and continue over longer periods.

**Attrition:** As many as 40 percent of WBI's participants change their address after they participate in WBI's activities, thus impeding efforts to contact them. Attrition diminishes response rates and threatens the validity of evaluation results.

**Attribution:** The Bank increasingly sees WBI's learning activities as part of a larger country assistance strategy. Hence, any change that takes place in human behavior and country policies could be the result of a combination of WBI's interventions and other development activities pursued by the Bank or other donors in a given country. It is difficult to isolate and quantify changes and then link them to WBI's interventions.

## **LIMITATIONS**

1.8 The findings in this report are based on a synthesis of results from individual studies, not all of which had the same purposes or methods. For this reason, readers should be aware of certain limitations when interpreting the results presented in the review.

1.9 The primary limitation is the quantity and quality of the evaluation data. First, the studies summarized in this report cover only a portion of WBI's learning initiatives. Second, the response rates from surveys of participants ranged from 30 to 70 percent, and not all the samples were drawn randomly, thus compromising the representativeness of the responses. Third, many variables and indicators examined have not been clearly or consistently defined across all evaluations. Fourth, there are some limitations in methodologies used by individual evaluations. Many estimates were based on bivariate analyses or explained only 10 to 40 percent of the variation in outcome measures, suggesting that potentially key explanatory variables were not included in WBIEG's evaluations (or that these variables vary considerably among WBI's learning events or across countries). Little analysis has been conducted in examining alternative hypothesis and interactive effects of a group of variables.

1.10 Given these limitations, the summary and conclusions derived from this review should be viewed as suggestive and imprecise rather than as definitive and conclusive. Readers of this review are encouraged to refer to individual evaluation reports as necessary for detailed information and to exercise caution in interpreting the findings.

## **2. WHAT EVALUATIONS TELL US ABOUT THE QUALITY OF WBI'S LEARNING EVENTS**

2.1 WBIEG evaluates most of WBI's training events to gauge participants' immediate reaction to and satisfaction with the learning activity.

### **PARTICIPANTS' PERCEPTIONS OF WBI'S LEARNING ACTIVITIES**

2.2 These evaluations solicit participants' ratings in six areas:

- (1) Relevance of the activity to their current work or functions (relevance);
- (2) Extent to which participants acquired knowledge that is new to them (new information);
- (3) Usefulness of the information obtained through the activity (useful information);
- (4) Focus of the activity on what participants are specifically interested in learning (focus on learning need);
- (5) Extent to which the content of the activity matched learning objectives (matched objectives); and,
- (6) The activity's overall usefulness (overall usefulness).

2.3 Although WBI has conducted assessments of participants' satisfaction with these activities since 1998, archival data for these assessments prior to 2002 are limited to those conducted by WBIEG, primarily for "core courses."<sup>2</sup> From 1999 to 2001, assessments were available for 113 offerings of 26 core courses (Ouchi, Shi, and Zhou 2001). This number increased to 295 in FY02, 341 in FY03, and 410 in FY04 representing 45, 50, and 46 percent, respectively, of learning events delivered in those years.<sup>3</sup>

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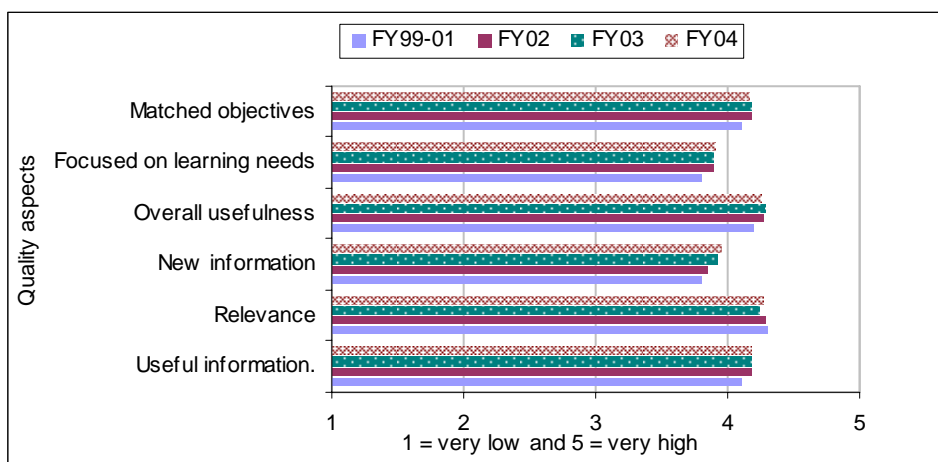
<sup>2</sup> The core policy course, or "core course," addressing key issues of development, has been WBI's learning strategy since 1998. Core courses are developed and delivered in collaboration with the Bank regional vice-presidential units, sectoral and thematic networks, and external partner institutions.

<sup>3</sup> WBIEG divides the number of level 1 evaluation submitted by the number of client offerings in a particular year. This is different from the submission rate reported in WBI Quality Reports, which divides the number of evaluations submitted by the sum of evaluations required plus exempt evaluations submitted.

2.4 Figure 1 illustrates average participant ratings for FY99 to FY01 and over the past three fiscal years. Ratings are slightly higher for FY02 to FY04 compared to FY99 to FY01. For four of the six items in the survey of participants – useful information, relevance, matched objectives, and overall usefulness – WBI’s learning activities during FY99 and FY04 were rated high (greater than 4 on a scale of 1 to 5). However, on providing new information and focusing on learning needs, participants rated between 3.8 and 4 for new information and an average of 3.9 for focus on participants’ learning needs. Changes in participants’ ratings of WBI’s learning events were not statistically significant over the years.

Most participants rated the overall usefulness of the WBI’s activity attended as a 4 or 5 on a scale of 1 (low) to 5 (high).

**Figure 1: Mean score of level 1 ratings, FY99-04**



**FACTORS INFLUENCING PARTICIPANTS’ PERCEPTIONS OF WBI’S ACTIVITIES**

2.5 What factors influenced participants’ perceptions of the quality of WBI’s activities? To date, WBIEG has not conducted comprehensive and advanced analyses (e.g., regression analysis) to estimate the influence of a range of course and participants’ characteristics on the quality of WBI activities so this question cannot be addressed as well as might be preferred.

2.6 Nevertheless, some WBIEG evaluations of the Bank’s staff learning programs have provided useful information on the influencing factors. As Lockheed and Arango (2005) found, adults value learning experiences that respect their autonomy and self direction, draw on their experience, and respect their goal orientation. Several features of formal courses are also important to World Bank staff. These include:

- Content relevant to participants’ work or anticipated work and that is practical and concrete;
- Good pedagogical features (order of presentation and quality of instructional materials);
- Instructor quality, including good facilitators; and,

- Time for learning. Two dimensions of time are important. The duration of an event and the number of participants affect the time available for a learner to participate in discussions and to interact with the instructor. The results across the three meta-analyses of the Bank's staff learning programs generally show positive effects for both class size and increased time, particularly with respect to perceived higher levels of skills and knowledge.

### **3. DO WBI'S LEARNING ACTIVITIES HELP PARTICIPANTS BUILD SKILLS AND KNOWLEDGE?**

3.1 One objective of WBI's learning activities is to help participants develop skills and knowledge that contribute to development. To what extent have these activities achieved this objective? The answer to this question emerges largely from level 2 evaluations of participant learning.

3.2 As described earlier, WBIEG has measured how much participants learned from the learning events. In addition to objective tests of the knowledge that are given at the outset and at the end of these events, WBIEG also uses self-assessments by participants to measure learning, particularly for some WBI's events where most participants are senior government officials.

#### **PROGRAM EFFECTIVENESS IN IMPARTING SKILLS AND KNOWLEDGE**

3.3 Since FY99, WBIEG and WBI's learning teams have completed more than 100 level 2 evaluations covering all but two of the current thematic programs.<sup>4</sup> WBIEG published meta-analyses of these level 2 studies in three evaluation reports, and two other studies reported the results of four other level 2 evaluations (Mackay 1999; Bardini 1999a).

3.4 The key messages from the five evaluations were consistent. Participants' test scores increased, and WBI's knowledge-based courses effectively imparted knowledge and built skills. Figure 2 illustrates the average increase in skills and knowledge based on all level 2 evaluations as reported in the meta-analyses. A statistically significant increase in learning varied between 8 and 11 percentage points for these studies. In the *Flagship Course on Health Sector Reform and Sustainable Financing*, learning gains were even higher, at 14 percentage points.

WBI's knowledge-based courses were effective in imparting knowledge and developing skills.

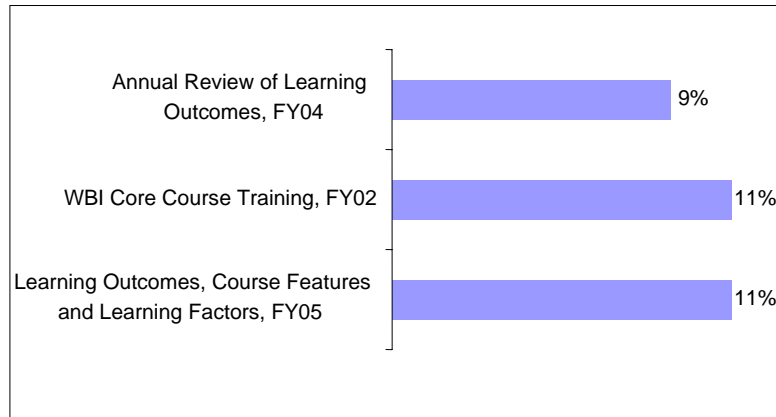
3.5 A recent meta-analysis of learning gains (Shi and Le Rouzic 2004) reported that 78 percent of the courses showed significant learning gains above the WBI benchmark.<sup>5</sup> The same study reported that the learning gains of WBI's programs have remained steady over the past few years, around 10 percentage points on average (see table 1).

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<sup>4</sup> Exceptions include WBI's Financial Sector Learning Program and the Leadership Program on AIDS.

<sup>5</sup> The average effect size of these courses was 0.72, which is also above the usual educational benchmark of 0.25. Effect size is the learning gain divided by the standard deviation of the pretest.

**Figure 2: Increase in participants’ skills and knowledge based on metanalyses, FY02-05**



**Table 1: Learning gains reported in WBI’s learning events, FY99-03**

Average	FY99	FY00	FY01	FY02	FY03
Pretest <sup>a</sup>	41.8	39.3	45.1	43.6	41.0
Posttest <sup>a</sup>	53.6	49.7	56.2	52.8	53.4
Gain <sup>a</sup>	11.9	10.4	11.1	9.2	12.4
Effect size	0.64	0.57	0.60	0.71	0.78
N	1,330	1,788	1,643	1,302	813

Source: Shi and Le Rouzic 2004.

<sup>a</sup> In percent.

### FACTORS INFLUENCING PARTICIPANTS’ LEARNING

3.6 Learning is a complicated process affected by environmental, experiential, instructional, cognitive, genetic, linguistic, and motivational factors, among others. Enumerating the effects of all these factors is difficult. The metanalyses examined the effects of a set of factors within the context of WBI’s client learning activities for which learning outcomes and data on activity features were available.

#### **Certain course features positively enhanced participant learning**

3.7 Shi and Le Rouzic (2004) associated six clusters of course features with higher posttest scores after controlling for pretest scores. These features were:

- Country-focused approaches/offerings, with most participants from only one country (national courses) or offerings in which participants came from only one or two regions;
- Traditional teaching approaches, i.e., face-to-face activities and small classes;
- Content difficulty: participants learned less in courses that focused on introductory materials than in advanced courses;

- Longer duration (more training days): each additional day boosted learning gains by 0.6 percentage points;
- Participants learned less in events that charged fees than in no fee-based events. But this effect may be spurious because fee-based courses were more heterogeneous in terms of country representation, which was also negatively associated with higher achievement; and,
- Positive conditions that were rated as greatly helpful to the learning events included available budget, available time, commitment of participants and presenters, relationships among stakeholders, and facilities.

3.8 Another metaanalysis (Ouchi, Shi, and Zhou 2001) supports many of the same findings. In examining WBI core courses delivered between FY99 and FY01, the study observed that:

- Core courses given in Washington, DC reported a lower learning gain than core courses presented in other locations;
- Core courses given by WBI showed greater learning gains and were also rated higher in comparison to those given by partners; and,
- Core courses using distance learning (DL) and courses that charged fees showed a lower learning gain than non-DL and no-fee activities, but their quality was rated higher.

### **Certain participants learn more than others**

3.9 The metaanalyses examined the influence of participant characteristics on learning, but the findings differ across studies. What these studies discovered was that participants with lower pretest scores were likely to be the greater learners than those with higher pretest scores.

Participants with lower pretest scores learn more than those with higher pretest scores

Moreover, younger participants, participants with less work experience, and those with an educational level of a master’s degree or above showed greater learning gains than their counterparts (Le Rouzic and Shi 2003).

3.10 Moreover, evaluation of WBI’s core courses from FY99 to FY01 found that participant characteristics such as sex, education, and years of work experience affected learning gains when activity content was held constant. Across all offerings, initial participant knowledge and knowledge of regional background were the most significant determinants of posttest scores and the most significant factors associated with learning. Pretest scores explained 18 percent of the variance in posttest scores for participants in core courses and 29 percent of the variance in the *Flagship Course on Health Sector Reform and Sustainable Financing*. In general, participants from East Asia and the Pacific and Latin America and the Caribbean regions gained more than those from other regions (Ouchi, Shi, and Zhou 2001).

3.11 Finally, box 2 summarizes the evidence from the evaluation of the Bank's staff learning programs. Boxes 3 and 4 provide information on factors that are not significantly related to learning gains and that can decrease knowledge gaps among participants.

**Box 2: What works? Effects of learning programs – evidence from evaluations of the Bank's staff learning programs**

- Awareness building is important for a shared vision.
- Features of learning programs associated with developing awareness include: (a) networking opportunities; (b) new, cutting-edge information; and, (c) high-priority corporate information.
- Increasing skills and knowledge enable staff to benefit from technical and professional advances.
- Features of learning programs that boost staff skills and knowledge are: (a) substance (including relevant case studies and concrete examples); (b) pedagogy; (c) instructor quality; and, (d) sufficient time, and small classes.

*Source:* Lockheed and Arango 2005.

**Box 3: Factors unrelated to learning gains**

- Planning features (such as conducting needs assessment, supporting future learning needs; mandating knowledge prerequisites; and number of stakeholders);
- Partnership involvement in delivery;
- Homogeneity of participants in terms of prior course knowledge, gender, native speakers of the course language;
- Using English as the language of instruction; and
- Covering a topic with clear and commonly accepted answers versus vague or controversial topics.

*Source:* Shi and Le Rouzic 2004.

**Box 4: Factors decreasing knowledge gaps among the participants**

- A composite of 10 good instructional strategies;
- Having participants work on a real-life project;
- Distance learning and longer time span; and
- Events not developed for specific countries.

*Source:* Shi and Le Rouzic 2004.

## 4. DO WBI'S LEARNING ACTIVITIES PROMOTE DEVELOPMENT?

4.1 The ultimate goal of WBI's efforts is to promote development. In the context of WBI's learning activities, the expected impact can thus be to (a) influence reform of country policies; (b) improve MDG indicators; and, (c) contribute to poverty reduction. In many cases, however, these impacts cannot be measured directly. Recognizing the difficulty of studying the impact of learning and based on behavioral theory, WBIEG conducts impact evaluations that measure a program's longer-term outcome using three proxy measures: perceived effectiveness, self-reported knowledge utilization, and perceptions of the program's influence. Since FY98, WBIEG has conducted 31 impact evaluations. Some assessed individual learning activities while others examined multiple learning activities related to particular thematic or country-focused programs. We grouped the 31 evaluations into three categories:

- Thematic program evaluations (a single learning activity or a group of activities related to one or more thematic programs);
- Country-focused evaluations (WBI's activities in a single country); and,
- Metanalyses (integrated analyses of evaluations from individual countries or thematic evaluations).

### Box 5: Key questions, methodology, and key outcome benchmarks of WBIEG impact evaluations

<i>Evaluation questions</i>	<i>Data sources</i>	<i>WBI's Benchmark FY02 (mean on a scale of 1-7)<sup>a</sup></i>
<ul style="list-style-type: none"> <li>• What is the relevance of WBI's learning activities?</li> <li>• What is the activities' effectiveness?</li> <li>• What is the activities' impact?</li> <li>• What factors influence outcomes?</li> <li>• How sustainable are the activities?</li> </ul>	<ul style="list-style-type: none"> <li>• Participant surveys</li> <li>• Focus group discussions</li> <li>• Interviews with WBI task managers</li> <li>• Interviews with Bank staff</li> </ul>	<ul style="list-style-type: none"> <li>• Relevance 5.0</li> <li>• Effectiveness 5.1</li> <li>• Use 4.4</li> <li>• Impact 5.4</li> </ul>

*Sources:* Liu, Jha, and Van Praet 2005; Chard and Jha 2005.

<sup>a</sup> WBI's benchmarks were established based on FY02 data, the year for which the most data exist, including 12 focus countries (Quizon et al. 2005) and data from other countries that were sampled for other thematic program evaluations.

## EFFECTIVENESS OF WBI'S LEARNING ACTIVITIES

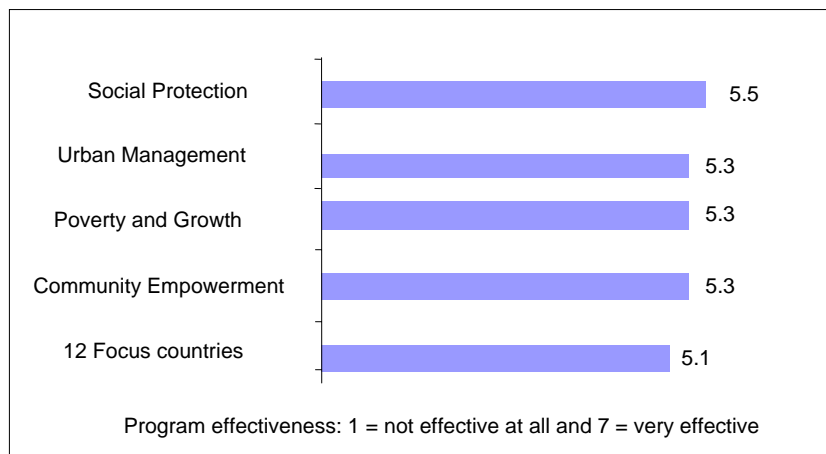
4.2 In WBIEG's impact studies, participants answered questions about six aspects of the effectiveness of the learning events they attended:

- awareness and understanding of development issues;
- skills and knowledge;
- their role in the development of their countries;
- strategies and approaches to address the needs of the participants' organizations;
- strategies and approaches to address the developmental needs of the country; and,
- networks among people with common interests.

4.3 As illustrated in figure 3 for thematic programs and figure 4 for 12 focus countries, participants found WBI's activities moderately effective. Mean scores ranged from 4.6 to 5.6 on scale from 1 (not effective at all) to 7 (very effective).<sup>6</sup> Ratings of country programs (all thematic programs in a single country) were generally higher than ratings for thematic programs (participants from all countries in single thematic activities). This may indicate that participants preferred more country-focused initiatives. Participants from low-income countries gave higher ratings for effectiveness than those from middle-income countries (Liu, Jha, and Van Praet 2005; Quizon et al. 2005).<sup>7</sup>

WBI's activities are considered to be moderately effective.

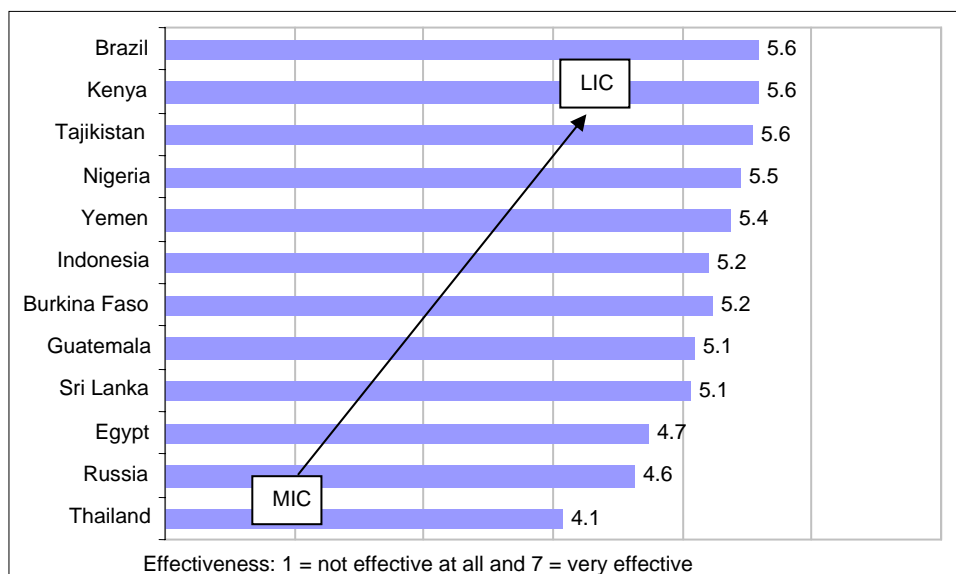
**Figure 3: Overall effectiveness of WBI's programs, FY01-03**



<sup>6</sup> The responses were categorized into low effectiveness (ratings 1 and 2), moderate effectiveness (ratings 3-5), and high effectiveness (ratings 6 and 7) on a 7-point scale (1 = not effective at all, 7 = very effective).

<sup>7</sup> Although Brazil is a middle-income country, the survey data were collected from low-income areas in the country.

**Figure 4: Overall effectiveness of WBI’s learning activities, FY01-03, by country**



4.4 WBI’s activities were most effective in providing skills and knowledge and raising awareness but less effective in three other areas: providing strategies and approaches to address the needs of participant organizations and countries, understanding the role of development, and helping participants to network (see table 2). The participants’ perceptions of effectiveness of WBI’s programs improved slightly over time.

**Table 2: Mean ratings of perceived effectiveness reported in six impact evaluations**

Evaluations	Areas of program effectiveness					
	<i>Raising awareness</i>	<i>Providing knowledge</i>	<i>Understanding role in development</i>	<i>Strategy for country</i>	<i>Strategy for organizations</i>	<i>Helping networking</i>
Community Empowerment and Social Inclusion (CESI), FY02-03	5.4	5.1	5.3	5.0	5.2	5.1
Poverty and Growth, FY02-03	5.5	5.8	5.3	5.2	5.2	5.1
Social Protection, FY02-03	5.6	5.3	5.2	5.0	5.5	4.8
Urban Management, FY02-03	5.5	5.5	n.a.	5.2	5.3	5.1
12 Focus countries, FY01-03	5.3	5.3	4.8	5.0	4.9	5.0
Five Focus countries, FY01-02	5.1	5.1	n.a.	4.8	4.6	5.2
Six WBI Client Programs, FY00-01 <sup>a</sup>	n.a.	5.2	5.1	4.9	n.a.	4.9

<sup>a</sup> The original measure was on a 5-point scale. To make a comparison, means were transformed to a 7-point scale. n.a. = not available

## FACTORS INFLUENCING PARTICIPANTS' PERCEPTIONS OF EFFECTIVENESS

4.5 What factors influence participants' perceptions of effectiveness? WBIEG used ordinary least squares or two-stage least squares regression to examine this question. One group of variables examined in the analysis included participants' characteristics such as sex, occupational position, and country. A second group of variables concerned pedagogical approaches or activity features such as delivery mode, use of action learning, and duration. Not all evaluations included the same variables. In addition, some qualitative evaluations identified other activity features thought to be related to effectiveness.

### **Activities with country-specific features were perceived to be more effective than activities without country-focused features.**

4.6 Among a majority of evaluations, at least three country-focused features were significant determinants of activity effectiveness, namely location of the activity, partner involvement, and program relevance to country needs.

4.7 Country-level factors accounted for a large share of the variance in ratings of effectiveness. The country variables (Brazil, Egypt, Nigeria, Sri Lanka, and Thailand, with the exception of Russia) capture the exogenous country-specific attributes and conditions that affected participants' ratings of WBI effectiveness. For example, activities that took place in Nigeria were rated as more effective overall in operational areas than were learning activities offered outside the participants' home countries (Chard and Arango 2004). Other thematic evaluations (Liu, Jha, and Van Praet 2005; Quizon et al. 2005) provided similar evidence.

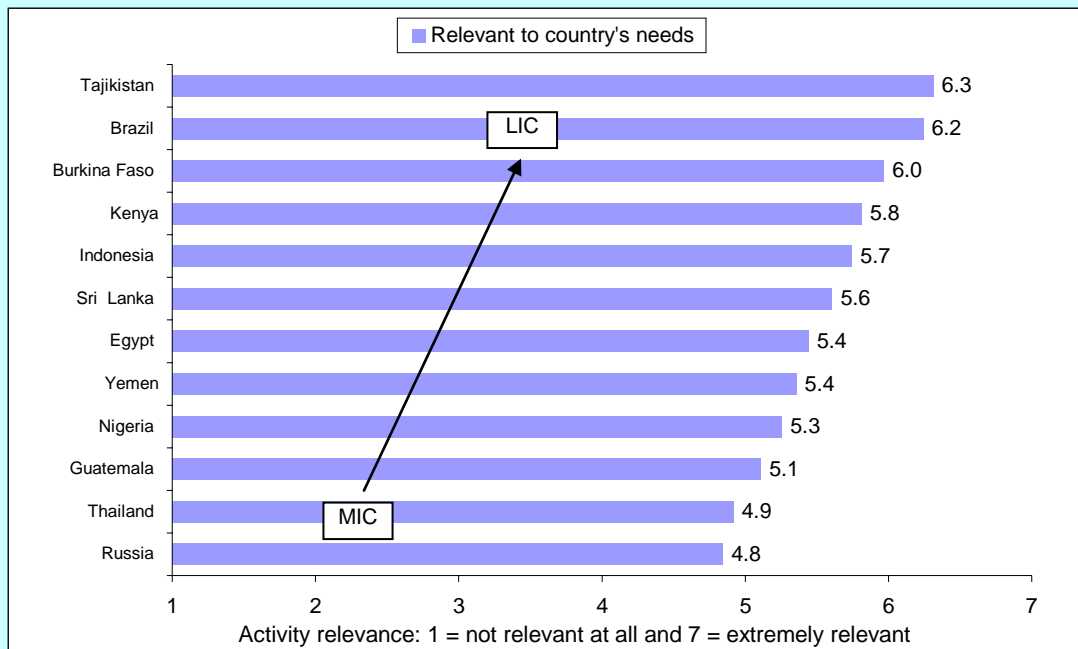
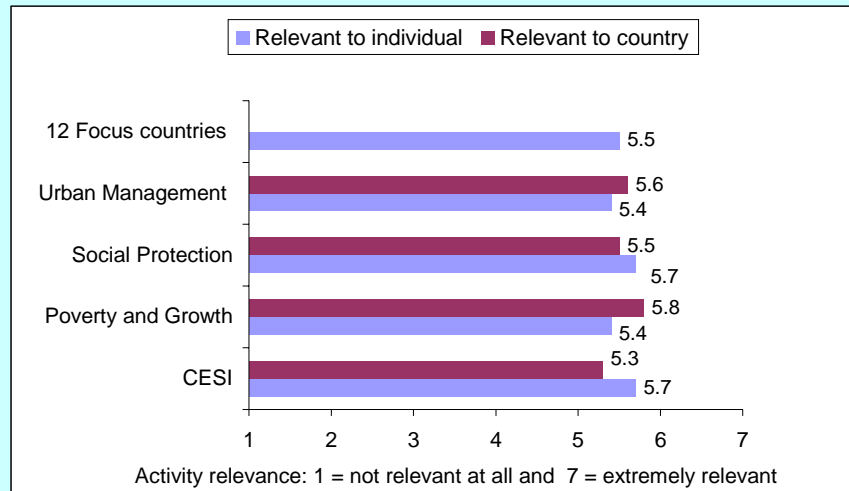
4.8 Quizon, Chard, and Lockheed (2004) found that task managers from WBI and local institutions valued greatly the use of local partners to design and deliver the learning event. This partner-oriented approach can bring local knowledge and experience with international concepts and input and may promote the sustainability of WBI's interventions.

4.9 The perceived relevance of WBI's learning activities enhanced the ratings of effectiveness. Effectiveness was rated higher in the four thematic programs when the participants considered that the program was designed to be relevant to them. As shown in the five-country evaluation, activities tailored specifically for country needs were rated as more effective than activities that addressed regional needs. This finding was consistent with results observed in almost all individual country-focused evaluations. For example, the ratings of activity relevance to Thailand were significantly related to assessments of the effectiveness of WBI's activities (Quizon and Chard 2003). In the Nigerian evaluation (Chard and Arango 2004), the coefficient of country relevance was high, indicating that WBI's activities became more positive as the rating of relevance to Nigeria increased.

### Box 6: Relevance of WBI's learning activities

Although participants' perceptions of relevance are not a direct measure of program outcomes, the evaluations assumed that relevance is an important predictor or determinant of outcomes.

Impact studies conducted by WBIEG since FY03 have asked participants to rate the degree to which the WBI activity was designed to be relevant to their country's specific needs and their work. Participants from both thematic and country-focused programs universally rated WBI's activities to be moderately to highly relevant, with mean scores around 5.5 on a scale from 1 (not relevant at all) to 7 (extremely relevant). Participants from low-income countries gave higher relevance ratings to WBI's activities than did those from middle-income countries



### **Developing an action plan during the activity can enhance the rating of program effectiveness.**

4.10 Developing action plans during the activity can enhance the effectiveness of WBI's learning activities.<sup>8</sup> The five-country meta-evaluation estimated that activities using action plans were rated as 11 percent more effective than activities without action plans (Quizon, Chard, and Lockheed 2004). In Kenya, the development of action plans as part of the activity was significantly related to higher ratings of effectiveness (Khatti, Jha, and Nikitin 2004). In Russia, developing an action plan during an activity increased the effectiveness rating by about 8 percent of the mean score. As an illustration, based on data collected from Russian participants, Bardini et al. (2003) noted that development of an action plan was a positive and significant determinant of overall utilization and utilization of course knowledge in raising others' awareness in development issues and implementing new practices within the work organization.<sup>9</sup>

### **Length of activities can influence perceived effectiveness.**

4.11 Khatti et al. (2002) concluded that the duration of the learning activity was significantly and positively related to participants' perceptions of effectiveness, especially with respect to knowledge/skills and strategies/approaches, but duration had no relationship to networking.<sup>10</sup> For events longer than about 12 days, however, there were diminishing returns in terms of effectiveness.

4.12 Two other evaluations (Bardini et al. 2003; Zia and Jha 2005) also reported that longer activities were associated with greater effectiveness than shorter activities. In Russia, the duration of the activity, having a helpful incentive system to implement new ideas in the work organization, and participating in a country-focused activity increased utilization as well.

4.13 By contrast, another evaluation (Liu, Jha, and Van Praet 2005) found a reverse relationship between duration and their rating of program effectiveness. Participants who attended short activities or conferences were more likely to give a higher effectiveness rating and to use course content more than those who attended longer courses and seminars.

4.14 All these different findings suggest that the influence of duration can be complicated by the type of events and participants. Senior government participants may

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<sup>8</sup> Action plans are those that specify how participants will apply the skills and knowledge from the WBI activity to their work.

<sup>9</sup> Bardini and his colleagues (2003) also found, however, that few of the Russian participants who prepared action plans used them.

<sup>10</sup> Three dimensions of effectiveness were derived from factor analysis. Knowledge/skills: an increase in or updating and refinement of skills and knowledge in the subject matter of the learning event. Strategies/approaches: development of strategies and approaches to solve issues and problems faced by the participant's organization or country. Networking: getting to know people working on the same subject matter and developing a common understanding of the subject matter with colleagues.

be more likely to attend short duration activities or conferences, but they may have power to influence implementation and policy.

**High quality of design and organization can enhance program effectiveness.**

4.15 In addition to the evidence from 13 impact evaluations with quantitative approaches, results from other qualitative evaluations (appendix 3) provided complementary evidence.<sup>11</sup> The factors that most enhanced learning impact and effectiveness were quality of the activity (design content, new information, materials, and presenters); relevance of the activity (country needs); and pedagogical approach (defined as class size, recruiting right participants, use of action plans, and participant involvement).

**Participants with a high level of proficiency with the technical terminology used in the event give high ratings on program effectiveness.**

4.16 As seen in table 3, four of six evaluations revealed that participants with a higher level of proficiency in course terminology considered WBI's activities to be more effective than did participants who were less proficient.

**Participants from low-income countries give high ratings on program effectiveness.**

4.17 Participants from low-income countries perceived WBI's activities to be more effective than did participants from middle-income countries. This finding is also supported by other country-focused evaluation studies. For instance, when individual countries were ranked in both five and 12 countries studies according to gross national income per capita, with the possible exception of Brazil, the levels of economic development of these countries were negatively associated with the perceived levels of program effectiveness. These country-based factors explained the large differences in effectiveness ratings and underscore the importance of a country-focused strategy in raising overall performance ratings of WBI's activities (Quizon, Chard, and Lockheed 2004).

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<sup>11</sup> Effectiveness defined by these programs is somewhat different from these quantitative impact evaluations, rather they are defined in a loose and broader way.

**Table 3: Influence of activity and participants' features on rating of program effectiveness**

Variables		Evaluation studies						
		<i>Six WBI Client Programs FY00-01</i>	<i>CESI FY02-03</i>	<i>Poverty and Growth FY02-03</i>	<i>Social Protection FY02-03</i>	<i>Urban Management FY02-03</i>	<i>Five Focus Countries FY01-02</i>	<i>12 Focus Countries FY01-03</i>
Activity features	Seminar	n.a.	n.a.	n.a.	↑	n.s.	n.a.	n.a.
	Workshop/clinic	n.a.	↑	n.a.	n.a.	n.a.	n.a.	n.a.
	Face to face	n.a.	↑	n.s.	n.s.	n.s.	n.a.	n.a.
	Duration	↑	↑	↓	n.s.	n.s.	n.s.	n.a.
	Action plans	↑	n.s.	↑	↑	↑	↑	↑
	Country focus/in-country event	n.a.	n.s.	n.s.	↑	n.a.	n.a.	n.a.
	English as language of instruction	n.a.	n.a.	↓	n.a.	n.a.	n.a.	n.a.
	Contact information	↑	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	Program relevance	n.a.	↑	↑	↑	↑	↑	n.a.
Participant features	Sex: female	n.a.	n.s.	n.s.	n.s.	n.s.	n.s.	↑
	Proficiency in language of instruction	n.s.	n.s.	n.a.	↑	n.s.	n.a.	↑
	Proficiency with technical terminology	↑	n.a.	↑	n.a.	↑	n.a.	↑
	High-level position	n.s.	n.s.	n.a.	n.s.	n.a.	n.a.	↑
	Government organization	n.a.	n.a.	n.a.	↓	n.a.	n.a.	n.a.
	Low-income country	n.a.	↑	↑	n.a.	↑	↑	↑

Note: ↑ = significantly correlated with higher effectiveness ratings; ↓ = significantly correlated with lower effectiveness ratings, n.s. = not significantly correlated with effectiveness ratings; n.a. = not available.

### IMPACT OF WBI'S LEARNING ACTIVITIES

4.18 In examining the impact of WBI's learning initiatives, WBIEG focused on two questions: (a) whether and how frequently participants used what they learned from WBI's activities; and, (b) if participants used what they learned, did the utilization bring positive changes to the organization and to the country?

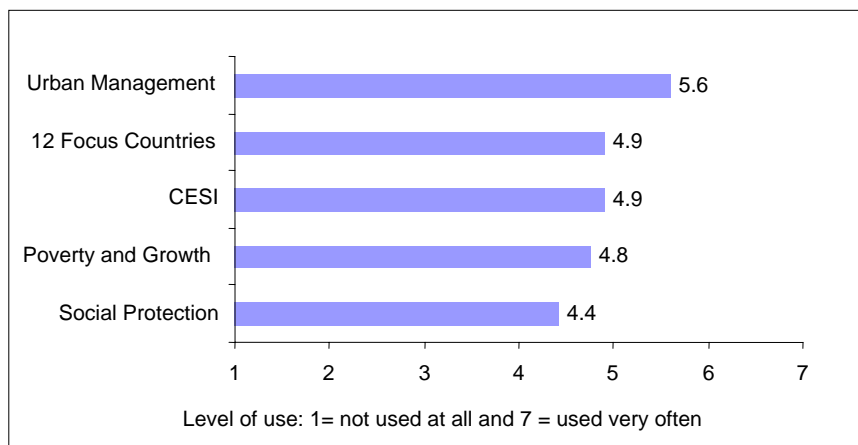
## Utilization of skills and knowledge gained from WBI’s learning activities

4.19 Across all impact evaluations conducted since FY02, between 57 and 93 percent of survey respondents reported using the skills and knowledge they considered applicable. Using a composite measure of use, the mean rating of use was largely in the midrange of possible responses across all thematic programs and most country-focused evaluations (figure 5).<sup>12</sup> Among the 12 focus countries (Quizon et al. 2005), reported use was considerably lower in most middle-income countries compared with low-income countries, especially for Russia and Thailand. The mean rating was less than 4 on a scale of 1 (not used at all) to 7 (used very often) (figure 6).

The reported use of WBI’s learning tends to be moderate, with an average score of 4 and 5 on a 7-point scale.

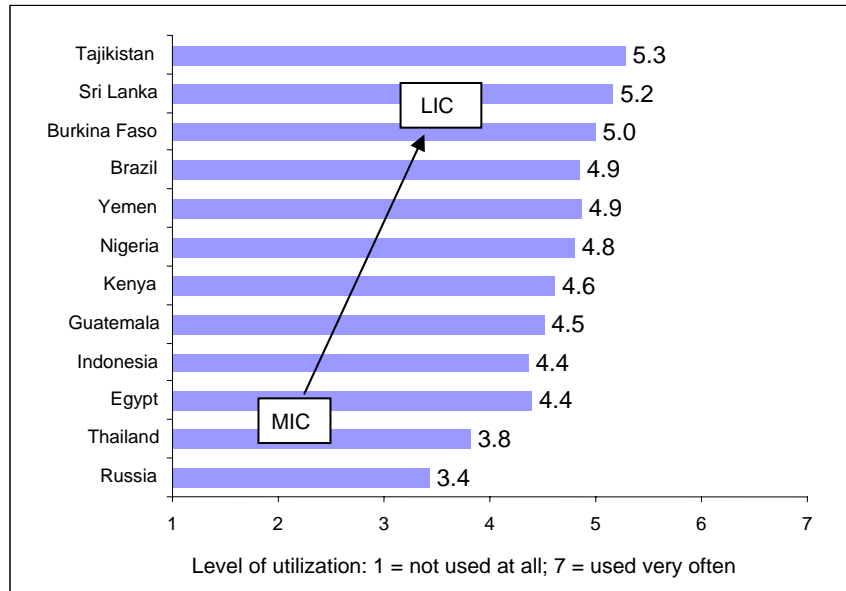
4.20 Among the seven areas of knowledge utilization (“use”) listed in table 4, knowledge utilization was strongest in raising public awareness and teaching, followed by research applications – all areas reflecting individual work and responsibility. The pattern also indicated a trend toward improved knowledge utilization over time, especially in the dimension of conducting research and teaching.

**Figure 5: Overall use of skills and knowledge learned from WBI’s programs**



<sup>12</sup> The level of use was measured in a 7-point scale. Most evaluations defined scores of 1 and 2 as low, 3-5 as moderate, and 6-7 as high use.

**Figure 6: Overall use of skills and knowledge learned from WBI’s learning activities, by country**



**Table 4: Areas and levels of use of skills and knowledge acquired from WBI’s learning activities (mean score)**

Evaluations	Areas of use						
	Teaching	Research	Awareness	New work practices	Country development strategy	Collective initiative	Legislation and regulation
CESI, FY02-03	5.4	4.6	5.4	4.8	4.5	5.1	4.1
Poverty and Growth FY02-03	5.1	4.7	5.1	4.7	4.6	4.6	4.2
Social Protection, FY02-03	4.8	5.0	4.9	5.1	4.5	4.3	4.6
Urban Management, FY02-03	4.9	4.9	5.2	5.1	4.4	4.7	4.4
12 Focus Countries, FY01-03	4.6	4.6	5.0	4.7	4.3	4.4	4.0
Six WBI Client Programs, FY00-01 <sup>a</sup>	4.4			4.5			

<sup>a</sup> The original measure was on a 5-point scale. To make comparison possible, means were transformed to a 7-point scale.

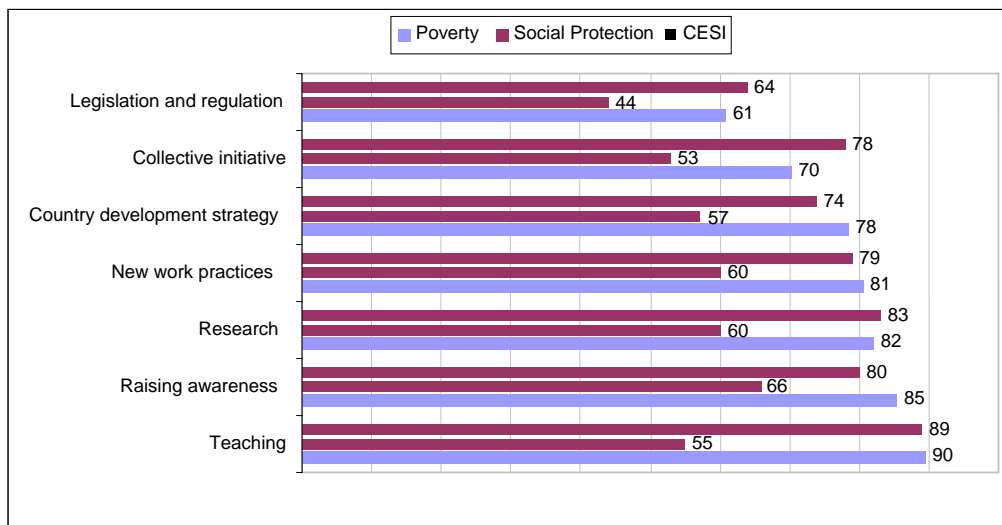
**WBI’s learning activities had strong influence on individual practice.**

4.21 To measure influence and change at the individual, organizational and institutional, and country levels, WBIEG’s surveys asked participants to rate the degree to which the activity had influenced or led to changes in areas addressed by the learning activity. The evaluations of three thematic programs (Social Protection, Community Empowerment and Social Inclusion and Poverty and Growth) found that most participants (66, 78, and 87 percent, respectively) perceived that WBI’s learning activities had a positive influence. The aggregated mean rating was above 5 on a scale from 1 to 7 (from negative influence to positive influence).

Perceived positive influence of learning activities		
Program/country	% of survey respondents	Mean
Social Protection	66	5.6
CESI	78	5.5
Poverty and Growth	87	5.6
City Management		5.2
Thailand	45	5.0
Russia	56	5.4
Tajikistan	56	4.2
Guatemala	64	5.1
Yemen	70	3.9
Burkina Faso	79	5.3
Brazil	80	n.a.
Egypt	90	n.a.
Sri Lanka	90	5.6
Kenya	95	5.8

4.22 As demonstrated in figure 7, participants from three thematic programs reported that the most positive influence or changes were observed in the area of teaching, followed by research and raising public awareness. The perceived impact and positive influence of the WBI’s activities was lowest at the organizational, institutional, and country levels, i.e., changes in work practices and legislation or regulations. A similar pattern emerged in the individual country evaluations. Appendix 4 contains a summary of participants’ ratings of change influenced by WBI’s learning activity in 12 countries.

**Figure 7: Percentage of participants indicating positive influence of WBI’s learning activities (rating of 6 and 7)**



4.23 Consistent with previous findings of relevance, effectiveness, and use, participants from low-income countries rated program impact significantly higher than did participants from middle-income countries. The gap was particularly remarkable for the highest rating scores – 22 percent more participants from low-income countries rated the impact of WBI’s programs at 6 or above on a 7-point scale (Liu, Jha, and Van Praet 2005).

4.24 The evaluation of the Poverty and Growth program (Liu, Jha, and Van Praet 2005) also found that participants from nongovernmental organizations (NGOs), the private sector, and the media reported a higher level of change induced by WBI’s activities than did participants working in the academic and government sectors. Participants with entry-level positions also gave high ratings to the impact of WBI’s learning events.

#### **FACTORS INFLUENCING PARTICIPANTS’ UTILIZATION OF KNOWLEDGE GAINED FROM WBI’S LEARNING ACTIVITIES**

4.25 Table 5 summarizes the factors that influenced participants’ utilization of what they had learned. The measures of utilization differed across studies because the objectives of the various activities differed, and the analyses assumed participants used what they learned in different areas. The results thus represent “use” in composite areas defined in evaluations of the following WBI events and programs:

- Overall use: WBI’s Poverty and Growth Program (Liu, Jha, and Van Praet 2005);
- Academic use (teaching, research, and raising awareness) and operational use (organizing collective initiatives, creating new development strategies, implementing new practices at work, and influencing legislation): six WBI client programs (Khattri et al. 2002), two multicountry studies (Quizon, Chard, and Lockheed 2004; Quizon et al. 2005), and two of WBI’s programs, Social Protection (Chard and Jha 2005), and Urban and City Management (Quizon 2005);
- Use in organizing community initiatives (organizing collective initiatives and raising awareness, and use in influencing legislation) — Community Empowerment and Social Inclusion (CESI) (Zia and Jha 2005); and,
- Use in discussing issues raised during the activity at work — CESI (Zia and Jha 2005) and Urban and City Management (Quizon 2005).

**Table 5: Influence of activity and participant on participants' utilization of knowledge and skill**

Variables		Evaluation studies						
		<i>Six WBI Programs FY00-01</i>	<i>CESI FY02-03</i>	<i>Poverty and Growth FY02-03</i>	<i>Social Protection FY02-03</i>	<i>Urban Management FY02-03</i>	<i>Five Focus Countries FY01-02</i>	<i>12 Focus Countries FY01-03</i>
Activity features	Duration	n.a.	↑	↓	n.a.	n.a.	n.a.	n.a.
	Use of action plans	n.a.	↑	n.s.	↑	n.a.	n.a.	n.a.
	Country focus/in country event	n.a.	n.s.	↑	n.a.	n.a.	n.a.	n.a.
	English as language of instruction	n.a.	n.a.	n.a.	n.a.	n.a.	↑	n.a.
	Contact information	↑	n.s.	↑	n.a.	↑	n.a.	n.a.
	Follow up	↑	n.s.	n.a.	n.a.	n.s.	↑	n.s.
	Program relevance	n.a.	n.a.	↑	n.a.	n.a.	n.a.	n.a.
Participants features	Sex: female	n.s.	↑	n.s.	↓	n.s.	n.a.	n.a.
	Proficiency in language of instruction	n.a.	n.s.	n.a.	↑	n.a.	n.a.	n.a.
	Proficiency with technical terminology	n.a.	n.a.	↑	n.a.	n.a.	↑	n.a.
	High-level position	n.s.	↑	n.a.	n.s.	n.s.	↑	↑
	Research organizations	n.s.		n.a.	n.a.	n.a.	n.a.	↑
	Government organizations	n.s.	↑	n.s.	↓	n.s.	n.a.	n.a.
	Low-income country	n.a.	↑	↑	↓	↑	↑	↑
Other	(Predicted) program effectiveness	↑	↑	↑	↑	↑	↑	↑
	Environmental factors	↑	↑	↑	↑	↑	n.a.	↑

Note: ↑ = significantly correlated with higher effectiveness ratings; ↓ = significantly correlated with lower effectiveness ratings, n.s. = not significantly correlated with effectiveness ratings; n.a. = not available. Results presented in this table are based on OLS and 2LS. Readers are encouraged to review this table in conjunction with Table 3.

4.26 The results in table 5 and findings from other WBIEG's evaluation studies suggest the following key messages about factors that influence utilization of skills and knowledge:

**Certain activity features can enhance participant use.**

- Activity effectiveness can enhance participant utilization. Activity effectiveness (whether measured or predicted) was consistently related to self-reported utilization across all studies. As estimated in the analysis of data from the 12 focus countries, a 10 percent improvement in overall effectiveness rating by participants can increase the frequency with which they use the learning by about 9 percent. On average, this corresponded to an improvement of 16 percent of the total possible increase in overall use. This effect was similar for both academic and operational use.
- Discussion of knowledge, experience, and lessons among participants during and after the events led to increased use. For example, discussing the subject

matter of the activity at work, with local partners, government officials, or NGOs increased Nigerians' overall use of the WBI-acquired skills and knowledge and academic use. This was also supported by the evaluations of two thematic programs, Community Empowerment and Social Inclusion and Urban and City Management. Furthermore, the evaluation of the Global Distance Learning Network (GDLN) revealed that the most significant factors leading to program impact were interaction with other participants, using an expert presenter, type of reading material that was provided, meeting local demand for content, and alignment of courses with MDGs (Jennings and Roberts 2004).

- Provision of contact information and follow up may enhance program impact. Evaluations of six thematic programs and the five-country meta-analysis reported that follow up and provision of contact information for participants were positively associated with program impact. As reported in the five-country meta-evaluation, activity follow up significantly raised participant use of learning. Qualitative findings from focus group discussions and interviews across all impact evaluation studies support this finding. Despite this finding, few of WBI's learning activities followed up with participants after the activities were completed. Lack of contact information and follow up were viewed by participants, Bank staff, and partners as important barriers to knowledge utilization. Typical comments from participants and partners illustrated the importance of follow up to facilitate subsequent application of learning.

*“by creating action plans and discussing Poverty Reduction Strategy Papers, we were actually under the impression that there would be follow up on implementation - but nothing!”*

*“It would be very ambitious to see any real changes happening without any monitoring or follow up.” “They spent a lot of money to send us to training, but no one followed up to see if this money was well-spent.”*

*“it is very difficult to measure medium-term outcomes since there is no follow-up support foreseen in the contract with the partners.”*

### **Certain participants used skills and knowledge more frequently than other types of participants.**

- Participants holding higher-level positions and working in government organizations used skills and knowledge gained in WBI activities more than did participants holding lower-level positions and working in NGOs or the private sector. For example, the evaluation of six WBI client programs observed that government participants were more likely to report a higher use in policy and practical arenas, whereas participants working in research areas reported a higher use in the academic field. Moreover, a participant's position was an important determinant of utilization in Brazil, Russia, Sri Lanka, and Tajikistan. In Brazil, the higher the position the greater the reported utilization of what was learned (Eckert, Gunnarsson, and Sousa 2004). A participant's primary type of

work and organization were significant indicators of use in Egypt, Sri Lanka, Tajikistan and Thailand.

- Participants with a higher level of proficiency with terminology used in the activity reported that they used the skills and knowledge acquired in the WBI activity more than participants with a lower level of proficiency. The evaluations of WBI's Poverty and Growth Program (Liu, Jha, and Van Praet 2005) and the five-country study (Quizon, Chard, and Lockheed 2004) showed that proficiency with the terminology was a significant factor that influenced a participant's level of use. The evaluation of the Poverty and Growth Program found that even small increases in proficiency led to sizeable gains in what participants reported they learned at the WBI's event. A similar finding was also observed in evaluations of WBI's learning activities in Indonesia, Egypt, and Nigeria. In Egypt, as an illustration, proficiency in terminology increased impact (use) by nearly 50 percent (Zia et al. 2003).
- Participants from low-income countries used more of the skills and knowledge they had acquired than those from middle-income countries. Because most WBI's programs evaluated were designed to address issues of low-income countries, participants from low-income countries benefited more from the WBI's event. This occurred in both the country focus (five and 12 countries) and most thematic program evaluations. As estimated in the evaluation of the Poverty and Growth Program, participants from low-income countries were nearly 40 percent more likely to use course content than participants from middle-income countries.
- A positive environment surrounding participants can enhance their use. Almost all evaluations revealed that the external environment at both the workplace and country levels played a significant role in affecting participants' utilization of skills and knowledge. In the 12-country evaluation, the influence of workplace factors was stronger and more significant than the country-level factors.

4.27 Evaluations of the Bank's staff learning programs provide similar findings (see box 7).

**Box 7: Impact of learning programs in the Bank – evidence from evaluations of the Bank's staff learning programs**

- Improvements in behavior are key to better teamwork and stronger leadership.  
Staff learning programs that involve interactive or action learning are effective in developing teamwork and in developing leaders. Teams benefit from learning experiences that allow for team interaction and that focus on actual tasks, but this may require a team coach to provide guidance. Successful coaches are often selected from among senior staff or managers, who have a deep understanding of the actual work.
- Operational impact comes from good learning programs combined with institutional support and value.
- Institutional support ensures that the right staff participate in the learning, there is suitable follow-up, and that supervisors are aware of the learning and value it.

*Source:* Lockheed and Arango 2005.

## 5. CONCLUSIONS AND RECOMMENDATIONS

5.1 The central objective of this review was to determine what pedagogical approaches, and activity features, and participants' characteristics contributed to and enhanced the outcomes of WBI's learning activities.

5.2 In addressing this objective, we examined four "outcome" indicators that correspond to the main objectives of WBI's learning activities – quality product and satisfaction, knowledge and skill building, behavioral change, and impact and change on the ground. In examining and summarizing the influence of many factors on the program outcomes, we concentrated on two groups of factors: activity features and participants' characteristics.

5.3 This review concluded that (a) WBI's learning activities have largely achieved their objectives and provide high-quality, relevant, and effective products to client countries; (b) these activities have successfully addressed the needs of low-income countries, at least in the opinion of participants included in the surveys; and, (c) the activities' outcomes can be ensured and enhanced by utilizing appropriate and sound designs and pedagogical approaches.

5.4 We offer several recommendations that WBI can use to improve the design, implementation, and evaluation of its learning activities.

### **At the strategic level, WBI should:**

- Increase attention to middle-income countries. Evidence across most levels of evaluations showed that WBI programs appropriately address the needs of low-income countries but not necessarily those of middle-income countries. For this reason, WBI should consider different designs, materials, and approaches for participants from middle-income countries. WBI's Regional Coordination unit should work with thematic program teams to make the necessary adaptations to current approaches to increase their relevance to middle-income countries.
- Promote an organizational culture and provide incentives to the learning teams that encourage attention to evaluation. High response rates are essential for meaningful evaluations. WBI should provide an accountability mechanism that specifies the institute's expectations for how evaluation information will be used as performance measures and provide incentives for completion of participant surveys as well as consequences for noncompliance with these expectations.

**At the program and activity levels, learning teams should:**

- Review the content of learning activities to ensure their relevance to the recipient countries and to the target population. Although WBIEG has found that needs assessment are not related to learning gains, such assessments may be useful in identifying issues that the activities should address, the objectives of prospective participants, and their level of familiarity with the language of instruction or the technical terminology to be used in WBI's activities.
- Review the objectives and design of their learning activities to ensure that objectives are specified clearly and address one or more of the following themes: raising awareness, increasing knowledge, or changing behavior. In addition, teams should specify how the program's and the activity's components support the intended objectives. For example, how is each component linked logically? Can the outcomes be attributed directly to the inputs? What are the intended intermediate outcomes of each learning activity? What are the outcomes of the inputs and some other critical factors that the program does not address directly?
- Review the current implementation plan. Is the intensity of the learning event sufficient to warrant the outcomes expected? What activity length is most appropriate, given the level of the intended audience and the desired objectives? Can the learning event be delivered within the participants' country? Who/which local institutions can be the partners for the delivery? Does the intervention target key players and sufficient numbers of staff from an organization to make a difference at the organizational level?
- Select pedagogical approaches that are known to be effective in achieving desired learning objectives. Among all effective features, use of action plans during learning events is highly recommended.
- Recruit and select participants with a suitable level of proficiency in the language of presentation and the technical terminology to be used during the event. In addition to setting clear criteria for enrollment, the learning teams can develop a simple screening form or test to ensure that qualified people come to the event, thus maximizing its impact and effectiveness. In turn, descriptions of learning events should specify the level of proficiency required in the language of instruction.
- Increase interaction and follow up with participants after learning events to provide ongoing support on knowledge application and information on recent developments, to create a platform for exchange, and to obtain feedback for program improvement. Lack of follow up from WBI is a recurring theme in several evaluations. WBI's follow up can be accomplished through periodic e-mails, newsletters, or by creating a website for participants.

**For future evaluations, WBIEG should:**

- Work with the learning teams to develop improved measures to assess the quality of learning events and outcomes, such as GDLN courses or policy dialogues, where the current assessment instruments may not satisfactorily assess quality or produce information of suitable value to the organizers of the events.
- Conduct further analyses to increase understanding of the interactive effects of influencing factors. Many WBIEG evaluations have examined the effects of influencing factors. The evidence is clear and compelling. What is less clear in these analyses is how individual variables interact to influence outcomes. Such analyses have particular relevance for WBI's learning teams. Task managers need to know not only the potential benefits of certain pedagogical approaches but also in what setting and for whom this pedagogical approach will be effective.
- Conduct an analysis of the costs of a program using different design and pedagogical approaches along with evaluation of the program's effects, so that it might be possible to make judgments about cost-effectiveness relative to other design and pedagogical approaches the learning teams could potentially apply.
- Improve the design and methodologies used in evaluations. Attempts should be made to employ experimental or quasi-experimental designs in studying the impacts of learning. More data sources should be explored. In addition to getting data from participants, information from task managers and partners may have great potential for capturing and understanding the richness and complexity of learning environments and their influence on learning outcomes.

## **APPENDIX 1: WBI PRODUCT LINE AND FORMATS**

### **Product Lines**

- (1) *Policy Services*: Tailor-made learning offerings provided to enhance understanding of critical policy issues linked to a Bank operational policy dialogue or in response to a direct client request, usually aimed at senior policy makers.
- (2) *Skills Building*: A structured learning offering intended to develop skills and knowledge. The content emphasizes practical knowledge and is drawn from the Bank's knowledge networks, research and policy analysis, and operational experience, as well as from the experience of partner organizations and leading research institutions.
- (3) *Knowledge Exchange*: Activities where the primary objective and principal pedagogical approach is an exchange of knowledge, information, and/or experience (including good/best practice) among practitioners, rather than a one-way transfer of information or skills.

### **Program Format**

- (4) *Workshop/Clinic*: A learning event of shorter duration (three days or less) and less formal structure, focusing on the practical application of learning or knowledge gained.
- (5) *Conference*: Formal meeting with groupings of simultaneous activities around a common theme or topic (such as Mediterranean Development Forum).
- (6) *Course*: Learning offerings consisting of a succession of modules and delivered over five days or more that address policy issues central to the World Bank's mission and make use of the Bank's comparative advantage: multi country operational experience and in-house expertise. All courses are expected to go through a process of internal and external peer review.
- (7) *Global dialogue*: Short videoconference sessions focusing on specific issues, knowledge exchange, and analysis on a range of policy issues and development topics.
- (8) *Seminar*: Learning offerings shorter in duration (typically one to five days) and less structured and formal than courses, typically attended by participants with advanced skill or experience. A seminar may include some formal course material used to address a specific policy issue, but will focus heavily on peer learning and joint problem solving.
- (9) *Study tour/field trip*: An organized activity that encompasses site visits to elaborate and build on shared experiences and research.

## APPENDIX 2: LARGE-SCALE AND METANALYSIS EVALUATIONS

Evaluation	Data collection method	No. of activities/offerings	No. of respondents (%)
<i>Performance of WBI Core Course Training, FY 1999-2001: An Evaluation</i> (Ouchi, Shi, and Zhou 2001)	Participant Level 1 survey, objective test	113	
<i>Impact Evaluation of WBI Client Programs, FY00-01</i> (Khattari et al. 2002)	Participant survey, TM survey and interview, FGD	25	640 (63%)
<i>Annual Review of Learning Outcomes from WBI Client Courses, FY02</i> (Le Rouzic and Shi 2003)	Quantitative analysis (OLS)	29	2508
<i>The Effectiveness and Use in FY03 of WBI FY01-02 Activities: A Baseline Assessment in Five Countries</i> (Quizon, Chard, and Lockheed 2004)	Meta-evaluations of individual reports, TM survey		1,006 (79%)
<i>An Evaluation of the Effectiveness and Outcomes of WBI FY01-03 Activities: Results from 12 Focus Countries</i> (Quizon et al. 2005)	Quantitative analysis (2SLS)		1,382 (71%)
<i>Learning Outcomes, Course Features and Learning Factors of WBI Client Learning Courses, FY02-03</i> (Shi and Le Rouzic 2004)	Quantitative analysis (HLM)	45	3,748

### APPENDIX 3: SUMMARY OF IMPACT EVALUATIONS USING QUALITATIVE APPROACHES

Evaluations	Data collection method	Response (rate)	Features	
			Activity	Participant
<i>The Water Policy Reform Program of the Economic Development Institute</i> (Bardini and Rist 1998)	Survey	28 (28%)	Participants' involvement; course management and organization; course duration	n.a.
<i>Women's Entrepreneurship Development Project Tanzania and Malawi</i> (Filion, Bulengo, and Mang'anda 1998)	Desktop review, interviews, meetings, site visits	n.a.	Design of the training; adaptation of training materials; Trainers' ability	n.a.
<i>Women's Enterprise Management Training Outreach Program--India Evaluation Report</i> (Neill, Sreedhar, and Kapadia 1998)	Interviews and site visits	n.a.	Appropriateness of training themes Content and methodologies Suitability of materials and methodologies	n.a.
<i>Report on the Impacts of Grassroots Management Training in India</i> (Creevey, Subramaniam, and Bdiaye 1998)	Document review, survey, interviews	253		Participant features. financial/enterprise profile
<i>EDI's Training Program on Social Policy Reform in Transition Economies (SPRITE) A Pilot Evaluation in Ukraine and Kazakhstan</i> (Martens, Wood, and Eckert 1998)	Survey, interviews	160 (76%) 176 (64%)	Course features	participant features(age, gender, position)
<i>An Impact Evaluation of the Sound Bank Management Program and Banking system Development Pro-gram in the Former Soviet Union</i> (Rist and Meiers 1999)	Document review, survey, interviews	229 (30%)	Quality of instruction; new knowledge; pedagogical design	n.a.
<i>Evaluation of the First Six Months of the Program, "Sustainable Forestry: National and Global Perspectives"</i> (Le Rouzic 1999)	Survey, interviews	69 (73%)	Selection of participants; new and useful information provided; multiregional and multisectoral representation; discussion with other participants	organization type, position

(Appendix 3 continues on next page.)

(Appendix 3 continued.)

Evaluations	Data collection method	Response (rate)	Features	
			Activity	Participant
<i>WBI's Work with Parliamentarians: A Systematic and Coordinated Approach is Needed</i> (Bardini 1999b)	Interviews, document review, observation, data extraction	n.a.	Small seminar; selection of right participants; working with partners; training venue far from working institutions; appropriate topics	n.a.
<i>Evaluation of the Project Implementation and Conflict Management Training Program for Bosnia-Herzegovina</i> (Bardini 2000)	Informal conversations, survey	60 (32%)	Quality of contents; training location; working with partner	n.a.
<i>Fiscal Decentralization in an Era of Globalization: An Evaluation of the World Bank Institute's Decentralization Program</i> (Bussman, Meiers, and Hadorn 2002)	Document study, interview, expert workshop, case studies; survey; peer review	126 (30%)	Quality of contents, materials, instructors, and presentation	n.a.
<i>The Quality and Learning of the Knowledge for the Development Action Learning Workshop for Africa</i> (Prom-Jackson and Ransom 2003)	Direct and systematic observation rating	n.a.	Quality of presentation and facilitation; action plans	n.a.
<i>Evaluation of the World Bank Institute (WBI) Macroeconomic Management Program</i> (Adrien and Quizon 2003)	Document review, interviews, data extraction, survey	81 (70%)	Selection of participants; participant involvement in the course; face-to-face training; course management	n.a.
<i>Evaluation of the Quality and Impact of Programs Facilitated by the GDLN</i> (Jennings and Roberts 2004)	Document review, staff interviews, TM survey, site visits, participant survey, FGD, videoconference	264 (60%)	Interaction with other participants; expert presenter; reading materials meeting local demand for content; alignment with MDGs	

## APPENDIX 4: PERCEIVED POSITIVE INFLUENCE OF WBI'S COUNTRY-FOCUSED PROGRAMS

Country	Raising awareness	Teaching	Research	New work practices	Country development strategy	Collective initiative	Legislation and regulations
Brazil <sup>a</sup>	65	61	56	71	n.a.	61	58
Burkina Faso <sup>b</sup>	5.5	5.3	5.9	5.5	5.5	5.4	5.1
Egypt <sup>a</sup>	34	38	38	35	n.a.	26	25
Guatemala <sup>a</sup>	50	60	57	42	43	41	46
Kenya <sup>a</sup>	65	58	53	54	58	60	41
Russia <sup>a</sup>	46	56	47	44	n.a.	39	50
Sri Lanka <sup>a</sup>	74	76	70	77	n.a.	71	59
Tajikistan <sup>a</sup>	89	89	84	88	83	65	72
Thailand <sup>b</sup>	4.9	5.2	5.0	5.2	n.a.	5.0	5.0
Yemen <sup>a</sup>	86	92	82	80	94	67	67

*Sources:* Brazil: Eckert, Gunnarson, and Sousa (2004); Burkina Faso: Le Rouzic (2005); Egypt: Zia et al. (2003); Guatemala: Liu, Richter, and Choi (2004); Kenya: Khattri, Jha, and Nikitin (2004); Russia: Bardini et al. (2003); Sri Lanka: Khattri, Bachrach, and Jiang (2003); Tajikistan: Zia and Jha (2004a); Thailand: Quizon and Chard (2003); Yemen: Zia and Jha (2004b).

*Note:* n.a. = not applicable

<sup>a</sup> Percentage of responses at 6 or 7 on a 7-point scale. For Tajikistan, percentage of respondents at 5 or above.

<sup>b</sup> Mean score on a 7-point scale.

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