

**The Joint Africa Institute:
A World Bank Institute
Review**

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<http://web.worldbank.org/WBSITE/EXTERNAL/WBI/0,,contentMDK:20252874~pagePK:209023~piPK:335094~theSitePK:213799,00.html>

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Acronyms and abbreviations

AfDB	African Development Bank
ADI	African Development Institute
IMF	International Monetary Fund
JAI	Joint Africa Institute
MOU	Memorandum of Understanding
OC	Oversight Committee
WBI	World Bank Institute
WBIEG	World Bank Institute Evaluation Group

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THE JOINT AFRICA INSTITUTE: A WORLD BANK INSTITUTE INTERNAL REVIEW

Introduction

1. At the request of the World Bank Institute's management, its Evaluation Group (WBIEG) commissioned a review of the Joint Africa Institute (JAI) to inform the renewal of the Memorandum of Understanding (MOU), signed by the African Development Bank (AfDB), the World Bank (the Bank), and the International Monetary Fund (IMF) in April 1999. The three institutions established the JAI as a collaborative effort in Cote d'Ivoire in November 1999. The MOU states that "... the primary purpose of the JAI is to provide policy-related training to selected government officials of, and other participants from, African countries."

2. The purpose of the review is to answer the four key questions noted below and to provide recommendations regarding modifications to the new MOU.

- a) Did the partnership function as originally envisioned in the MOU? What were some of the issues and how could they be resolved in the future?
- b) Did the Bank achieve its primary objectives and capacity-development mandate through the JAI, and if not, why?
- c) What are likely to be the short- and long-term costs and benefits of supporting JAI?
- d) Based on past experience, are there different options for and/or alternatives to supporting JAI to meet the challenge of capacity development effectively and efficiently?

3. The sections below address each of these questions. The first section briefly describes the partnership as it was envisioned and how it actually functioned. Section two considers the achievements of the partnership and how they relate to the Bank's (and WBI's) primary objectives and capacity-development mandate, indicating the reasons for the shortcomings (question 2) and issues to be resolved (second part of question 1). Section 3 discusses the likely short- and long-term costs and benefits of supporting JAI (question 3), presenting different options and alternatives to supporting JAI (question 4), indicating in this context how to resolve the issues identified in this review (as requested by the last part of question 1). Finally, the last section provides a summary of the recommendations. Appendix A provides a brief overview of the approach to the review.

Section 1: Partnership functioning as envisioned in the MOU

4. Aside from three exceptions, two of which were relatively minor, the partnership has functioned as envisioned in the MOU, as described below.

- a) As indicated in the MOU, a committee composed of representatives of the three institutions (the Oversight Committee) met at least annually to review the progress made and to make decisions about JAI's operations, including the budget. As per the MOU, the JAI director reported to the Oversight Committee (OC) on the JAI's activities.
- b) Each partner institution was responsible for the preparation and delivery of its respective courses/seminars and for selecting participants. In the case of the few joint offerings, the institutions concerned shared the responsibility.
- c) The learning program of the JAI was jointly determined on an annual basis by the OC.
- d) The lecturers in the courses comprised staff and consultants from the partner institutions for their respective courses, as envisioned in the MOU.
- e) The AfDB provided the JAI with dedicated premises and covered the corresponding costs. The displacement of the AfDB and the JAI from Abidjan to Tunis required that AfDB provide new suitable facilities, which it did.
- f) The AfDB, the Bank, and the IMF share the operating costs of the JAI, as established by the MOU.

5. Therefore, the partnership largely functioned administratively as envisaged, with the exception of three items. First, according to the MOU, the partnership among the three institutions was expected to take full advantage of the synergies and complementarities each has to offer. An implicit assumption was that by jointly funding a training institute in Africa, the three partners would work jointly. A fundamental way in which this could have taken place is through joint offerings. However, as illustrated in Table 1 (and in more specifically in Appendix B), of the 73 activities implemented by the JAI since November 1999, only three (about 4 percent) were joint activities (involving all three partner institutions). Thus, this is an aspect in which the partnership did not take full advantage of the synergies and complementarities each has to offer.¹ Any revisions to the MOU should articulate what these synergies are and how they can promote each of the sponsor's objectives in supporting the JAI.

¹ Thus, the name of the Institute in French, "Institut Multilatéral D'Afrique," describes the way it operated more accurately than does its name in English, "Joint African Institute."

Table 1: JAI Number of activities per year, by leading organization (1999-2004)

Calendar Year	IMF	WB	AfDB	Joint Activities	Total
1999	1	1	0	1	3
2000	3	3	2	0	8
2001	7	3	4	0	14
2002	6	4	4	0	14
2003	8	4	2	0	14
2004	9	6	5	0	20
TOTAL	34	21	17	1*	73

* Two of the 17 activities in which the AfDB took the lead also involved the other two partners; therefore, the total number of joint activities is actually three.

Source of Data: JAI Database; see Appendix B

6. Interviews and document reviews reveal that the partnership has essentially served a different purpose for each of the three partner institutions. For the IMF, the JAI is a “satellite institute” in Africa, serving as a delivery channel for its standardized courses and contributing to the implementation of the IMF Institute’s program. For the AfDB, the JAI provides the opportunity to play a more visible role in the development training of African government officials. Finally, the JAI partnership has served as a way for the Bank to comply with a strong request from a strategic partner, AfDB, in Africa. Though the WBI indicated some reluctance to enter into the JAI partnership, given the Bank’s commitment to the JAI and an offer of the Bank’s Africa Region to share part of the partnership’s cost, WBI agreed to represent the Bank at the JAI.

7. The second, minor exception was that although the staff of the JAI have been rotating, as indicated in the MOU, the position of “chief economist” was relabeled “deputy director,” and the support staff positions took time (until 2004) to be filled. The IMF appointed the administrative officer, while the AfDB appointed the support staff. Both positions were decided upon in consultation with the JAI’s director. Currently the JAI staff is composed of a director (AfDB), a deputy director (the Bank), an administrative officer (IMF), and seven support staff funded by the AfDB.

8. Finally, another exception to the implementation of the MOU according to its original text is the extension by one year of the date for the review of JAI operations by the three institutions. This extension was achieved through an amendment to the MOU, signed in September 2004.

Section 2: Achievements and issues

9. The JAI's achievements and issues need to be considered in the context of its three phases of evolution and consolidation. During the first phase, from November 1999 until the beginning of 2003, significant time was devoted to obtaining suitable facilities in Abidjan. The director was from the IMF and the JAI's second management position (at that time called "chief economist") was from the AfDB. A second phase started at the time of relocation to Tunis in the first quarter of 2003, which resulted in a low level of activities. A third phase of consolidation, in Tunis, began in September 2003 with the appointment of a deputy (or assistant) director from the Bank, the offering by AfDB of suitable facilities to JAI, and the incorporation of additional support staff. Indeed, 2004 was the first year in which the JAI was able to implement its work program fully, and there was greater involvement of the Bank and the AfDB than had been the case previously, in addition to the continuation of activities organized and implemented by the IMF.

Achievements

10. As described in the introduction, in establishing the JAI, the MOU stated that the institution's primary purpose is to provide policy-related training to selected government officials of, and other participants from, Africa. JAI achieved this rather modest and general objective, as measured through the implementation of 73 training activities from November 1999 to December 2004, with 2,392 participants from African countries and 17,468 participant days (see Tables 1 and 2).

11. To develop a training program capable of being implemented in the short run, during 2004 the JAI employed an "opportunistic" strategy during 2004, searching for opportunities to implement training activities that were already in the pipeline for the IMF, the Bank, and the AfDB.

Table 2: Number of participants and participant days, by leading organization (1999-2004)

Calendar Year	No. Of Participants Per Leading Partner Organization				No. Of Participant Days Per Leading Partner Organization			
	IMF	WB	AFDB	TOTAL	IMF	WB	AFDB	TOTAL
1999	71	79	45	195	515	460	113	1,088
2000	79	118	59	256	790	745	590	2,125
2001	220	127	138	485	1,581	754	866	3,201
2002	208	148	85	441	2,115	925	425	3,465
2003	221	134	34	389	1,506	970	170	2,646
2004	273	193	160	626	2,805	1,338	800	4,943
TOTAL	1,072	799	521	2,392	9,312	5,192	2,964	17,468

Source of Data: JAI Database; see Appendix B

12. So far, the JAI has been basically a supply-driven training organization. The first phase (November 1999 until the beginning of 2003) consisted of a core of IMF-

sponsored activities. The IMF replicated training activities taking place elsewhere, and, therefore, incurred development costs lower than those of the other partners and a rich pipeline of training activities. This was not the case for the other two partners, who exhibited limited participation during this phase.

13. It is worthwhile to point out, however, that AfDB staff became more involved in JAI's activities during the past two years. In fact, whereas the AfDB was the leading agency in two of the 14 JAI activities implemented in 2003, it was the leading agency in five of the 20 JAI activities implemented in 2004 (see Table 1). Furthermore, in 2004, the AfDB's African Development Institute (ADI) took an active role in identifying activities in which it could take the lead. This development suggests that some capacity development might have occurred for one partner as a result of the partnership.

Issues: Costs

14. From WBI's perspective, one of the key issues affecting the efficiency of the partnership has been the unequal distribution of training activities between the institutions. The IMF initiated 34 of the 73 JAI activities implemented between November 1999 and December 2004 (see Table 1). In this context, the principle of equal cost sharing established in the MOU meant that there was a subsidy from the Bank and the AfDB to the IMF over that period, since IMF initiated the most activities. Furthermore, from the Bank's perspective, another source of inefficiency is that JAI paid for the costs of participants without cost recovery (except when a trust fund was involved, as was the case for a risk management seminar in which the AfDB took the lead, and a Japanese trust fund covered the costs of several participants). A consideration of ways to solve these two issues is provided below.

15. A comparison of the costs incurred by each partner shows that average cost per participant per day for the JAI courses in which the Bank took the lead in 2004 was \$601, about 80 percent higher than the average cost for courses in which the IMF took the lead.² The difference is primarily due to development costs; whereas the development costs of the six JAI courses in which the World Bank took the lead in 2004 amounted to \$266,963, the total development costs corresponding to the nine IMF courses was \$59,930. Key reasons cited for the Bank's higher development costs are customization of the course content, use of consultants (as opposed to mostly staff or staff only, which the IMF tends to do), and production of teaching materials, such as CD-ROMs, for the AfDB's subsequent use in its own training activities.

16. Furthermore, the IMF activities were of a longer duration, and this was also an important factor in the difference of cost per participant per day. As Table 2 shows, the difference in the total number of participant days in IMF-sponsored activities vis-à-vis the Bank-led activities was much higher than the difference between their total numbers of participants.

² Appendix C provides details on the costs and shows that the cost dispersion is large, ranging from \$29,000 to \$151,000.

Table 3: Comparison of JAI cost per participant per day (in US\$)

January-December 2004			
<i>Leading Partner Organization</i>	<i>Cost of JAI Activity*</i>	<i>Cost Per Participant per Week</i>	<i>Cost Per Participant per Day</i>
AfDB	384,174	2,401	480
IMF	936,401	1,669	334
The Bank	803,745	3,005	601

* With a few exceptions, most of the activities are courses. The costs considered include travel costs and development costs (e.g., resource persons, interpretation, and miscellaneous items).

17. The JAI’s costs minus “overhead” (in particular, the salaries and benefits of the director, deputy director, and administrative officer) doubled between its first year of operations and 2004, from \$1,008,900 to \$2,124,320 (an annual rate of increase of approximately 14 percent in nominal terms), shared by the three partners (see Appendix C).

18. While the travel expenditures for the relocation to Tunis led to an increase in costs in 2003, there were efficiency gains in 2004, with a decrease in average travel costs (including travel allowance), from \$2,076 in 2003 to \$1,509 in 2004. The decrease was due to a number of factors, including a larger number of decentralized offerings, improvement in operating procedures (the lists of participants were sent to the travel agent ahead of time, allowing for a better search of airfares), and the travel agent’s increasing experience (as the number of participants with travel costs per year increased from 389 to 551 between those two years).

Issues: Emphasis on capacity building

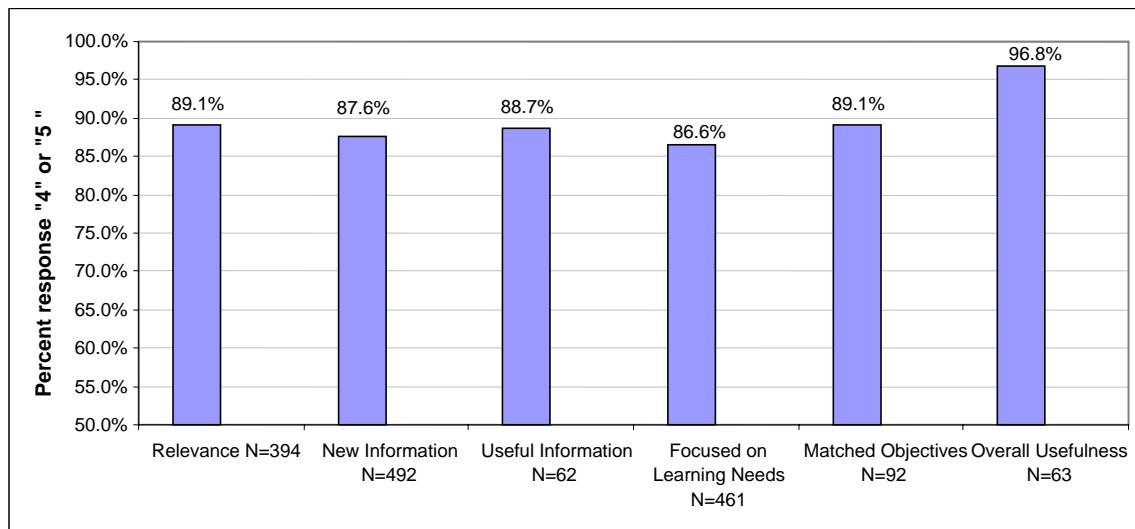
19. Another key issue, from WBI’s perspective, was the lack of sufficient emphasis on capacity building, given that the partnership was designed and implemented with a focus on individual training activities (which may lead to human capacity but not necessarily to the enhancement of organizational or institutional capacity).

20. It should be noted, however, that neither the MOU nor its amendment includes a single reference to “capacity building” or to sub-Saharan Africa. Despite the fact that JAI’s inaugural seminar focused on “capacity building, governance and economic reform in Africa,” the JAI has been delivering training largely focused on the development of individual skills, mostly without systematic needs assessments. Though some of the JAI’s activities may have led to sustained capacity, this was not an explicit objective of JAI.

21. JAI’s monitoring and evaluation system has been focused on the input level (i.e., activities and expenses). Activities have not been designed in such a way that facilitates their evaluability: there are no criteria defined ex-ante to assess implementation and impact (neither in terms of initial benchmarks nor intermediate outcomes). The reporting and accountability instrument, “activity reports,” is aligned with the JAI’s objective, and it basically reports on individual training activities with no reference to results or use of the skills/knowledge by the individuals trained.

22. Existing information suggests that participants judge the quality of the activities to be high. Information from Level 1 (participant reactions) evaluations is available for 16 of the 20 JAI courses³ offered in 2004—a submission rate of 80 percent, which is above the WBI benchmark of 67 percent.⁴ The vast majority of participants (80 percent or more) provided high ratings (ratings of 4 and 5, on a 5-point scale) for the JAI activity they attended on all indicators of immediate quality (see Figure 1).⁵

Figure 1: Percentage of JAI activity respondents providing high ratings (2004)



Source: JAI Database; see also Appendix D

23. Although this set of results is well above the 80 percent quality benchmark set by the WBI, it must be interpreted with caution for the following reasons:

- None of the available IMF or AfDB course evaluations contained questions addressing four of the six WBI quality dimensions: *Useful Information*, *Focused on Learning Needs*, *Matched Objectives*, and *Overall Usefulness*. Thus, these particular indicators of quality pertain to WBI courses only.
- Although all six of the WBI course evaluations had questions that could be mapped to WBI Level 1 quality dimensions, not all evaluations contained questions addressing each of the six dimensions.

Issues: Emphasis on partnerships and demand

24. Though the JAI partnered with some international and bilateral organizations such as the Canadian International Development Agency, the Gesellschaft für Technische Zusammenarbeit, the International Labor Organization, the Kreditanstalt für Wiederaufbau, the UN Conference on Trade and Development, the World Health

³ The courses with evaluations include six WBI-led, four AfDB-led, and six IMF-led courses.

⁴ The JAI Level 1 questions are slightly different but were mapped to the standard questions used in the WBI's Level 1 evaluations. Appendix D provides the details.

⁵ The results are based on an aggregation of all JAI courses regardless of the lead institution.

Organization as well as with some African organizations, like the Development Bank for Southern Africa, the Ghana Institute of Management and Public Administration, and the Southern African Development Community's Development Finance Center, there are other key African institutions that have not yet been involved in JAI activities, despite their recognized competence (such as the African Economic Research Consortium, which could collaborate with the JAI to share the knowledge gathered by its research network). Last but not least, there has not been a JAI demand-led capacity-building strategy.

Section 3: Costs and benefits of supporting JAI and options for the future

25. In considering the short- and long-term costs and benefits of supporting JAI, it is worthwhile to consider that the AfDB will have a new president in 2005. It is possible that the change in leadership will considerably reduce pressure on the Bank to enter into a new phase of the partnership with conditions similar to those of the first five years, which includes equal cost sharing with the other partners and almost zero cost recovery. This type of arrangement for the Bank has a high cost with respect to financial resources and low benefits, if any, in terms of achieving its capacity development mandate. It should be noted that the MOU stipulates that the "...heads of the AfDB, the IBRD, and the IMF will review the operations of the JAI in the fourth year of its operation to agree on its future beyond the five-year period," and that the amendment to the MOU extended the deadline of the review to December 31, 2005. Therefore, given that the agreement regarding the JAI's future should be preceded by a review that was postponed, it would be possible to decide on the JAI at a date after the appointment of a new AfDB president, when there may be a higher probability of developing a new partnership that can lead to a better cost/benefit ratio for the Bank than that corresponding to a partnership similar to the current one, as is elaborated in the following paragraphs.

26. As previously discussed, two factors affecting the costs of the partnership to the WBI have been the application of the principle of equal cost sharing despite the unequal distribution of the work program (with a significantly higher proportion of IMF courses) and zero cost recovery of training participants' costs. It should be noted that WBI's view regarding cost recovery is different from that of the other two partners, which do not aim at direct recovery of training participants' costs. In the future, resolving these issues would require an MOU that:

- Includes a clause linking cost sharing by each institution to its share in the JAI's program, and
- Specifies that capacity building is an explicit partnership objective, and that JAI should develop a capacity-building strategy emphasizing demand, through mechanisms such as cost recovery (by charging fees) and needs assessments.

27. The issue of cost recovery could be at least partly resolved, even in the framework of the current MOU, by an active search for funding partners (such as bilateral donors) that could fund activities without the possible unintended effects of exclusion that could be associated with cost recovery. Furthermore, more use could be made of distance

learning, including e-learning, video conferencing, and other technologies that could expand outreach, facilitate continuous learning after the courses, and potentially reduce costs.

28. Furthermore, supporting a JAI that develops and implements a demand-led capacity development strategy could facilitate the integration of capacity-building activities with country programs, based on needs assessments done in the context of analytic and advisory activities and economic and sector work or as part of the design or implementation of country assistance strategies. This approach would require a much more active participation of the Bank's Africa Region in the design and implementation of the WBI's contributions in the JAI's eventual new phase. Thus, the new JAI MOU could make an explicit reference to capacity-building needs assessments and country-level relevance in a new MOU.

29. Furthermore, the engagement of bilateral partners active in the region (for example, Germany, the Netherlands, Norway, and the United Kingdom) may not only reduce costs for the Bank (and the other two JAI partners), but could also play a role in promoting harmonization among donors, which would be another potential benefit of supporting the JAI.

30. Last, offering joint courses or other activities, in which the three partners jointly participate in their design and implementation, is one of the key challenges on which the OC should focus. Of course, the likely costs to and benefits for the Bank of supporting the JAI depend on the different options or alternatives for this support.

31. Based on the preceding observations concerning the JAI experience, we discuss several options for consideration for supporting the JAI to meet the challenge of capacity development effectively and efficiently.

(a) WB as minority partner

32. This option would restrict the Bank's support to sponsoring a limited number of JAI activities and to limit its financial contribution in proportion to those activities. An advantage of this arrangement is that it manages expectations concerning the Bank's involvement while also reducing its financial contribution. Conversely, reducing the Bank's financial contribution without compensation (through other means) could jeopardize relationships with strategic partners, particularly if the negotiation of the new agreement is finalized before the appointment of a new AfDB president. Furthermore, opportunities for the integration of capacity building with country program operations and for harmonization would also be reduced by the restricted participation of the Bank in the JAI.

(b) WB as a knowledge partner

33. Another option is to de-emphasize the Bank's financial contributions of the Bank and to focus rather on its role as a knowledge partner and, eventually, as a supporter in fund raising. The JAI has already mobilized limited funds from a bilateral source (Japan), but it may be possible to scale-up this mobilization of funds, which could reduce the need

for funding from the Bank, and, at the same time, contribute to the JAI's sustainability. An advantage of this option is that it would allow the Bank to continue (and to be perceived) as a key partner even if its financial contribution is reduced. Furthermore, the WBI could contribute through the JAI to enhance capacity building and to make progress in the harmonization agenda. A disadvantage is that the Bank could still be under pressure to maintain its financial contribution at the same level as during the first phase.

(c) WB exit in the short-run

34. The Bank could delay discussion of a new MOU until the new AfDB president is appointed. At that time, if it is not possible to negotiate a new MOU that is satisfactory to the Bank, with an appropriate emphasis on capacity building and other aspects mentioned in the preceding paragraphs, the Bank could consider its exit from the partnership. An advantage of this option is that it would avoid continuing a relationship marked by the reluctance of the Bank to enter into it, given its limited relevance in terms of capacity building and its high cost. A disadvantage is that it is likely that the pressure on the Bank would be high to continue its current level of support to the JAI, which the current AfDB president perceives as an important component of his legacy. Furthermore, the JAI is also appreciated by senior AfDB management and staff, who are likely to continue in the institution under the new president. Last but not least, with some adjustments, the JAI could make contributions, as noted earlier, that may be valuable for the Bank.

(d) WB as a mainstreaming partner

35. Whereas option (b) above made reference to JAI's sustainability, and to a specific modality by which it could be promoted (through the involvement of bilateral donors), an alternative way to look at the JAI is through an analogy with project implementation units. Experience shows that such units can play a role in special circumstances to facilitate the implementation of projects or programs, but that in the long run they can hamper capacity building. To avoid this negative effect, it is important to ensure an exit strategy of the PIU to allow for full capacity building. In the case of JAI, this view would mean the absorption of JAI within AfDB, in a sort of mainstreaming process, with the support of the Bank. As stated earlier, AfDB significantly increased its participation in the JAI. The new MOU could eventually include an explicit reference to mainstreaming JAI within the AfDB. This option, which may require special efforts to persuade the IMF of its convenience, may maximize African ownership and capacity building, and it would allow the Bank to phase out its participation progressively, without the risk of missing the opportunities to contribute to capacity building and harmonization mentioned earlier. At the same time, this option would require strengthening AfDB's capacities to allow it to assume JAI's management, which could be one of the objectives to be included in the new MOU.

(e) WB as a contributing partner

36. This option combines elements of options (b) and (d), emphasizing the different ways in which the Bank can contribute to the partnership: sharing knowledge, cooperating in strengthening the AfDB's capacities to manage JAI, facilitating the

process of establishing partnerships with other donors and fully supporting specific JAI activities in which the Bank would be the leading agency (through a certain number of joint activities). This option could minimize the disadvantages and maximize the advantages of the preceding options.

Section 4: Summary of recommendations

37. This section summarizes the recommendations made in the previous section. The recommendations are compatible with all options considered, except option (c).

- A new MOU should include the support of capacity building in Africa as an explicit partnership objective, with particular emphasis on sub-Saharan Africa and on the AfDB's capacity to manage the JAI. Furthermore, it would also be convenient to include a clause in the MOU linking yearly cost sharing by each institution to its share in the JAI's program.
- A JAI demand-led capacity-building strategy should be developed with active participation of the Bank's Africa region to link training with the capacity-building dimension of country programs. This approach will enable the JAI to go beyond training individuals to focus also on the organizational and institutional level. The MOU could also include an explicit reference to the use of capacity-building assessments.
- The OC should pay particular attention to activities in which the three partners jointly participate in their design and implementation, as well as activities that contribute to strengthening AfDB's capacity to manage the JAI. The MOU could contain a clause requiring a certain percentage of activities to be designed and delivered jointly and incorporate incentives for staff of the three organizations to do so.
- The engagement of bilateral partners present in the region should be actively and systematically promoted, not only as a means to cost sharing but also as an opportunity to promote donor harmonization in the region.
- Systematic use should be made of distance learning, including e-learning, video conferencing, and other technologies that could expand outreach, facilitate learning through post training activities, and reduce per participant costs. The new MOU could consider stipulating that the JAI establish its own video conferencing facilities.
- Finally, the new MOU should require the development and implementation of a monitoring and evaluation system that articulates not just inputs but that also defines intermediate outcomes.

38. If option (c) were chosen, it would limit the Bank's influence with a strategic partner for development in the region, its ability to enhance its capacity-building agenda, and its efforts at promoting donor harmonization.

APPENDIX A: REVIEW APPROACH

This World Bank Institute's review of the Joint Africa Institute (JAI) is based on: (a) semistructured interviews with the JAI and the AfDB staff in Tunis and Bank staff in Washington DC; and (b) a review of JAI and background documentation.

List of interview questions

- (a) To what extent did the JAI achieved its objectives? Which were the critical factors in the degree of achievement of the objectives, in particular the capacity building objective?
- (b) To what extent do you consider that the JAI's objectives are relevant?
- (c) Did the partnership function as originally envisioned in the MOU?
- (d) What were some of the critical issues, and how could they be resolved in the future?
- (e) Which decision processes were followed to design the JAI's program?
- (f) What has been the role of the AfDB in the management, design and implementation of the JAI's activities?
- (g) To what extent the JAI's operations have been efficient?
- (h) What are likely to be the short- and long-term costs and benefits of the JAI, if it continues as it is?
- (i) Did the JAI experience have any effects on the Africa Development Institute?
- (j) Based on past experiences, are there different options and/or alternatives to supporting the JAI to meet the challenge of capacity development effectively and efficiently, and in a sustainable way?
- (k) Is there a functioning monitoring and evaluation system for the JAI? What are the current indicators of success?

Key informants

Joint Africa Institute

Michael Bauer, Director,
Karin Millett, Deputy Director,
Marie-Ange Saraka-Yao, former Deputy Director
Arda Graiss, Administrative Officer

African Development Bank

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Negatu Makonnen, ADI
Mohammed Tani, ADI
Robert Mondeil, ADI
Tim Turner, Director
M. Hedi Manai, Chief Evaluation Officer
Mohammed Borenane, Manager
Mousa Toure, Credit Risk Analyst
Leila Mokadem, Principal Investment Economist
Driss Lekorchi, Principal Civil Engineer
Douglas Barnett, working on the results agenda
Gabriel Negatu, dealing with harmonization

World Bank

Guy Darlan
Michael Sarris
Philip Karp
Paul Noumba
Gilles Doussault
Richard Cambridge

IMF Institute

Roland Daumont
Francoise Le Gall

Documents reviewed

JAI Activity Reports
Minutes of the Oversight Committee Meetings
JAI Evaluation Forms
Independent Evaluation Reports (see Appendix E)
Memorandum of Understanding (and Amendment)
Documents quoted in the text of this report

APPENDIX B: JOINT AFRICA INSTITUTE LIST OF ACTIVITIES

1999-December 31, 2004

Calendar		No.	Leading Organization				No. of	Language		
<i>Year</i>	<i>Date</i>	<i>Weeks</i>	<i>IMF</i>	<i>WB</i>	<i>AfDB</i>	<i>Event</i>	<i>Participants</i>	<i>English</i>	<i>French</i>	<i>Bilingual</i>
1999	Nov. 2-3	0.5	X	X	X	Inaugural Seminar-Capacity Building, Governance and Economic Reform in Africa	133			1
	Nov. 8-26	3	X			Money and Banking Statistics	27	1		
	Nov.29-Dec.10	2		X		Policy and Institutional Reform for Sustainable Rural Development	35			1
2000	Jan. 10-21	2	X			Financial Programming and Policies	28		1	
	* Jan. 31-Feb 2	1		X		Governance, Transparency and the Media for a Sustainable Economic Development	53			1
	Feb. 21-March 3	2			X	Restructuring and Privatization of Public Enterprises	30		1	
	March 13-24	2		X		Macroeconomic Management: Current Policy Issues and Quantitative Methods	31		1	
	April 10-21	2	X			Banking Supervision-On-Site Supervision	26	1		
	April 24-May 5	2	X			Public Finance	25		1	
	June 19-30	2			X	Economic Growth and Poverty Alleviation	29	1		
	Oct. 23-27	1		X		Monetary Operations	34	1		
2001	Jan. 29-31	0.5	X			Value Added Taxation	28			1
	Feb. 5-7	1			X	Post Privatization and Governance Regulation	35			1
	Feb. 26-March 2	1		X		Social Health Insurance	42	1		
	March 5-9	1	X			Foreign Exchange Policies and Operations	25	1		
	March 19-April 6	3	X			Money and Banking Statistics	30	1		
	April 5-6	0.5	X			High-Level Seminar on Globalization and Africa	38			1
	May 14-19	1	X			Banking Supervision-Off-Site Supervision	36		1	
	* April 30-May 4	1			X	Poverty Reduction Strategies <u>1</u> /	37			1
	June 25-27	0.5		X		Capacity Building for Oversight and Watchdogs Institutions	45			1

(Appendix B continues on next page.)

(Appendix B continued.)

Calendar		No.	Leading Organization				No. of	Language		
Year	Date	Weeks	IMF	WB	AfDB	Event	Participants	English	French	Bilingual
	Sept. 10-21	2	X			Financial Programming and Policies	30	1		
	Sept. 24-Oct 5	2			X	Economic Growth and Poverty Reduction	37		1	
	Oct. 15-26	2	X			Govt. Exp. Policy and Public Exp. Management	33	1		
	Nov. 5-16	2			X	Governance and Economic Growth	29	1		
	Dec. 3-12	2		X		Quantitative Macroeconomic Analysis for Growth and Poverty Reduction	40		1	
2002	Jan. 14-25	2	X			Financial Programming and Policies	31		1	
	Feb. 4-8	1		X		Health Insurance	34		1	
	Feb. 11-March 1	3	X			Balance of Payment Statistics	31		1	
	March 4-22	3	X			Money and Banking Statistics	31		1	
	March 25-April 5	2	X			Fiscal Management	29	1		
	April 8-12	1			X	African Labor Markets and Poverty Reduction	33		1	
	April 15-19	1		X		Health Insurance	23		1	
	April 22-May 2	2		X		Quantitative Macroeconomic Analysis for Growth and Poverty Reduction Strategies	37	1		
	May 13-17	1	X			Banking Supervision-Off-Site Supervision	30	1		
	June 10-14	1		X		Project Appraisal, Monitoring and Evaluation	42			1
	* June 17-21	1			X	Poverty Reduction Strategies 1/	36			1
	Sept. 9-20	2	X			Financial Programming and Policies	31	1		
	* Dec. 9-11	1			X	High-Level Seminar on NEPAD 2/	27			1
	Dec. 9-13	1			X	Poverty Reduction, Design and Monitoring of PRSPs	26	1		
2003	Jan. 13-24	2	X			Financial Programming and Policies	27	1		
	Jan. 27-31	1	X			Tax Policy and Administration	32	1		
	Feb. 3-7	1		X		Health Insurance	27		1	
	Feb. 10-21	1	X			Fiscal Management	26	1		
	April 7-11	1		X		Regional Course on Health Insurance	36		1	
	April 22-May 2	2		X		Quantitative Macroeconomic Analysis for Economic Growth and Poverty Reduction Strategy	32		1	

(Appendix B continues on next page.)

(Appendix B continued.)

Calendar		No.	Leading Organization				No. of	Language		
<i>Year</i>	<i>Date</i>	<i>Weeks</i>	<i>IMF</i>	<i>WB</i>	<i>AfDB</i>	<i>Event</i>	<i>Participants</i>	<i>English</i>	<i>French</i>	<i>Bilingual</i>
	June 9-13	1	X			Safeguards Assessments of Central Banks	26	1		
	* Sept. 1-12	2		X		Macroeconomic Management for Financial Stability and Poverty Reduction	28	1		
	Sept. 15-26	2	X			Financial Programming and Policies	28		1	
	Oct. 27-Nov. 7	2	X			Macroeconomic Forecasting	34		1	
	* Nov. 11-14	1			X	Challenges of Rural Development	23			1
	Nov. 17-21	1	X			Financial Soundness Indicators	26			1
	* Dec. 1-5	1			X	Poverty Reduction Strategies <u>3</u> /	22			1
	Dec. 10-12	1	X			High-Level Seminar on Financial Integration	22			1
2004	Jan. 19-28	1.5		X		Assurance of Quality of Project/Program Design & Implementation in Africa	33	1		
	Jan. 26-Feb. 6	2	X			Financial Programming and Polices	32	1		
	Feb. 9-27	3	X			Balance of Payments Statistics	31		1	
	March 22-26	1		X		From Project Finance to Public Private Partnership in Infrastructure	36		1	
	April 12-23	2	X			Financial Programming and Polices	31		1	
	April 19-30	2		X		Public-Private Partnerships Regulation of Transport Infrastructure	34			1
	April 23-30	1		X		The Coverage of Health Risks in Francophone Africa	44		1	
	* June 21-25	1			X	The New Partnership for Africa's Development (NEPAD) and Regional Integration	33			1
	August 2-13	2	X			Financial Programming & Policies	31	1		
	Sept. 6-10	1	X			Payment Systems	28	1		
	Sept. 20-Oct. 1	2	X			Expenditure and Policy Management	30		1	
	Sept. 27-Oct. 1	1			X	Treasury & Risk Management Tools	29	1		
	Oct. 4-15	2	X			Financial Programming & Policies	30		1	
	Oct. 25-29	1			X	Development of Small & Medium Enterprises	22			1
	Nov. 1-19	3	X			Government Finance Statistics	36		1	
	Nov. 8-12	1		X		Workforce Policies in Health Sector	22			1

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(Appendix B continued.)

Calendar		No.	Leading Organization				No. of	Language		
<i>Year</i>	<i>Date</i>	<i>Weeks</i>	<i>IMF</i>	<i>WB</i>	<i>AfDB</i>	<i>Event</i>	<i>Participants</i>	<i>English</i>	<i>French</i>	<i>Bilingual</i>
2004	Nov. 15-19	1			X	Risk Management	50	1		
	Nov. 29-Dec. 3	1			X	Franchising within an SME Development Strategy	26			1
	Nov. 29-Dec. 10	2		X		Quantitative Macroeconomic Analysis for Economic Growth & Poverty Reduction	24		1	
	Dec. 6-10	1	X			Monetary and Financial Statistics: Compilation and Reporting Issues	24	1		
	Total	111					2,392	27	26	20

1/ Seminar was offered by the AfDB in collaboration with the IMF and the WB.

2/ Seminar was offered by the AfDB in collaboration with the IMF.

3/ Seminar was offered by the AfDB in collaboration with the WB.

* Revised: 1/24/2005

APPENDIX C: JOINT AFRICA INSTITUTE OPERATIONAL COST

JAI Yearly direct operational cost of courses/seminars delivered, by leading organization (1999-2004)*

(In United States Dollars)

	<i>1999-2000</i>	<i>2001</i>	<i>2002</i>	<i>2003</i>	<i>2004</i>	<i>Total</i>
AfDB	172,732.44	408,728.72	295,236.56	191,684.19	384,174.00	1,452,555.91
IMF	541,958.74	629,407.41	819,750.85	938,320.27	936,401.38	3,865,838.65
WB	293,205.48	229,491.98	350,526.19	493,637.12	803,745.01	2,170,605.78
Total	1,007,896.66	1,267,628.11	1,465,513.60	1,623,641.58	2,124,320.38	7,489,000.33

*Direct operational cost of courses/seminars delivered yearly by each partner. The figure does not include overhead.

APPENDIX C: JOINT AFRICA INSTITUTE OPERATIONAL COST (CONTINUED)

January 1-December 31, 2004

Cost per Participant per Week and per Day, 2004

<i>Offered by</i>	<i>Title</i>	<i>Date</i>	<i>No. of Weeks</i>	<i>No. of Part.</i>	<i>No. of Part. w/travel Cost</i>	<i>Location</i>	<i>Total Cost without Resource Persons & Lecture Room, etc.</i>	<i>Cost per Participant Per week</i>	<i>Average Airfare Cost Per Participant</i>	<i>Develop. Cost Resource Persons and Lecture Room per Course</i>	<i>Total Cost Per Activity</i>	<i>Total Cost Per Institution</i>	<i>Cost Per Participant Week 6/</i>	<i>Cost Per Participant Per Day 7/</i>
AfDB	The New Partnership for Africa's Development (NEPAD) and Regional Integration	6/21-25	1	33	30	Tunis	91,292	2,766	1,630	15,434	106,727			
	Treasury & Risk Management Tools	9/27-10/1	1	29	27	Tunis	83,654	2,885	1,776	4,488	88,142			
	Development of Small & Medium Enterprises	10/25-29	1	22	21	Tunis	57,641	2,620	1,400	9,029	66,670			
	Risk Management (Cost p/part is divided by 50) 1/ and 2/	11/15-19	1	50	32	Cape Town, SA	29,438	589	667	0	29,438			
	Franchising within an SME Development Strategy	11/29-12/3	1	26	22	Tunis	68,784	2,646	1,505	24,413	93,198	384,174	2,401	480
IMF	Financial Programming and Polices	1/26-2/6	2	32	32	Tunis	119,532	1,868	1,680	14,113	133,644			
	Balance of Payments Statistics	2/9-27	3	31	29	Tunis	119,753	1,288	1,325	7,911	127,664			
	Financial Programming and Polices	4/12-23	2	31	29	Tunis	98,221	1,584	1,401	11,187	109,408			

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<i>Offered by</i>	<i>Title</i>	<i>Date</i>	<i>No. of Weeks</i>	<i>No. of Part.</i>	<i>No. of Part. w/travel Cost</i>	<i>Location</i>	<i>Total Cost without Resource Persons & Lecture Room, etc.</i>	<i>Cost per Participant Per week</i>	<i>Average Airfare Cost Per Participant</i>	<i>Develop. Cost Resource Persons and Lecture Room per Course</i>	<i>Total Cost Per Activity</i>	<i>Total Cost Per Institution</i>	<i>Cost Per Participant Week 6/</i>	<i>Cost Per Participant Per Day 7/</i>
IMF	Financial Programming & Policies, Pretoria, SA (Hotel includes Part.'s Accom.-full board- + farewell dinner+coffee breaks. Per diem is \$20/per day)	8/2-13	2	31	28	Pretoria, SA	74,977	1,209	567	15,489	90,466			
	Payment Systems	9/6-10	1	28	28	Tunis	83,042	2,966	1,825	1,262	84,304			
	Expenditure and Policy Management	9/20-10/1	2	30	29	Tunis	97,211	1,620	1,353	1,755	98,966			
	Financial Programming & Policies	10/4-15	2	30	28	Tunis	99,340	1,656	1,458	5,336	104,675			
	Government Finance Statistics	11/1-19	3	36	29	Tunis	118,661	1,099	1,386	1,812	120,473			
	Monetary and Financial Statistics: Compilation and Reporting Issues	12/6-10	1	24	19	Tunis	65,736	2,739	2,063	1,065	66,801	936,401	1,669	333.83
WB	Assurance of Quality of Project/Program Design & Implementation in Africa <u>3/</u>	1/19-28	1.5	33	26	Cape Town, SA	89,989	1,818	1,369	61,678	151,667			
	From Project Finance to Public Private Partnership in Infrastructure in North Africa (# of part. includes 16 Tunisian)	3/22-26	1	36	20	Tunis	50,150	1,393	999	18,740	68,890			

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<i>Offered by</i>	<i>Title</i>	<i>Date</i>	<i>No. of Weeks</i>	<i>No. of Part.</i>	<i>No. of Part. w/travel Cost</i>	<i>Location</i>	<i>Total Cost without Resource Persons & Lecture Room, etc.</i>	<i>Cost per Participant Per week</i>	<i>Average Airfare Cost Per Participant</i>	<i>Develop. Cost Resource Persons and Lecture Room per Course</i>	<i>Total Cost Per Activity</i>	<i>Total Cost Per Institution</i>	<i>Cost Per Participant Week 6/</i>	<i>Cost Per Participant Per Day 7/</i>
WB	Public-Private Partnerships Regulation of Transport Infrastructure 4/	4/19-30	2	34	34	Cape Town, SA	143,096	2,104	1,313	100,914	244,010			
	The Coverage of Health Risks in Francophone Africa (Part. Per Diem is \$50/per day)	4/23-30	1	44	44	Paris	124,408	2,827	1,353	25,729	150,137			
	Quantitative Macroeconomic Analysis for Economic Growth & Poverty Reduction 5/	11/29-12/10	2	24	24	Dakar, Senegal	88,593	1,846	1,485	39,602	128,195			
	Workforce Policy in the Health Sector	11/8-12	1	22	20	Accra, Ghana	40,006	1,818	982	20,840	60,846	803,745	3,005	601
Grand Total			30.5	626	551		1,743,524	39,341	27,537	380,797	2,124,320	2,124,320		

Lecture room includes: Resource person (RP), lecture room, IT equipment, technician, course material/documentation, and press conference.

1/ Activity largely financed by Japanese TF. JAI financed only airfare and social functions of 32 participants originating from SADC region.

2/ The JAI financed only the airfare and social functions for the Risk Management seminar, which led to a reduction in the cost per participant per week.

3/ Dev. Cost includes consultants, development of documentation, CD ROMs, bags, pouches for participants, posters.

4/ Development cost includes interpretation equipment, consultant, and resource persons for the development of course materials and case studies.

5/ Development cost includes conference room for videoconferencing; conference room with computers and a secretariat, photocopies and printing of course material, and office supplies.

6/ Grand total cost of each institution divided by number of participants of each course multiplied by corresponding number of training weeks.

7/ The cost per participant per day is based on the number of training days per week (five days).

APPENDIX D: JOINT AFRICA INSTITUTE QUESTIONNAIRE MAPPING

Question Category	JAI Questions	Equivalent L1 WBI Client Evaluation Questions
Relevance	Your participation in the course will positively affect your carrying out your duties	Relevance of this activity to your current work or function
	Relevance of this activity to your current work or function	Relevance of this activity to your current work or function
New Information	The course provided you with new knowledge and new skills	Extent to which you have acquired information that is new to you
	Extent to which you have acquired information that is new to you	Extent to which you have acquired information that is new to you
Useful Info	Usefulness for you of the information that you have acquired	Usefulness for you of the information that you have acquired
Focused on Learning needs	The content of the course was consistent with your expectations	Focus of this activity on what you specially needed to learn
	Focus of this activity on what you specially needed to learn	Focus of this activity on what you specially needed to learn
Matched Objectives	Matched the stated objectives/ Matched announced objectives	Extent to which this training achieved its announced objectives?
Overall usefulness	Overall usefulness of this activity	Overall usefulness of this activity

KEY
Minimum-----Maximum
Strongly Disagree--Neither---Strongly Agree
Unknown 5 Point Scale. These questions appear on 1 or 2 evaluations only.

APPENDIX E: REFERENCES TO THE JAI IN INDEPENDENT EVALUATION REPORTS

This appendix simply reports the results from other evaluations. It does not provide reasons for the discrepancies between the current report and other evaluations, which may have used a different methodology.

Independent Evaluation of the African Development Fund VII, VIII and IX, “Stepping Up to the Future,” Operations Evaluation Department, African Development Bank, July 2004

1. This evaluation was undertaken by a team of ten specialists from the Institute of Development Studies at the University of Sussex in the UK, under the overall supervision and support of the Operations Evaluation Department of the AfDB.
2. The report includes a section on the JAI (pp.58-9), where it is stated that the core mission of the JAI is “to enhance African institutional capacity building and human resources development....Through...its courses the JAI aims to provide high-quality training to as many Africans as possible. These include not only government and central bank officials but also representatives of the private sector and civil society, Africa-based NGOs, academics and researchers, representatives of workers unions and the media, and other participants from the continent. These activities contribute to pan-African linkages by bringing together participants from the different African countries not only through residential courses but also through video-conferencing sessions, networks and distance learning meetings.”
3. “The JAI has only recently been established (...) and it is far too early to assess what degrees of success might be achieved. So far, the arrangements that have been made appear to be sound. What is not yet clear is the extent of the role that the AfDB will play in the initiative.”

External Review of the Strategic Partnership between the African Development Bank and the World Bank, June 2003

4. The external review report of the initial phase of the Strategic Partnership was conducted by a team of three external reviewers; the principal reviewer was a retired World Bank Operations Evaluation Department officer.
5. The report states (p.13) that “JAI has organized a large number of training events over the past three years, 2000-2002, the majority conducted by AfDB’s African Development Institute. The World Bank and AfDB have jointly presented three courses a year, and AfDB has single-handedly conducted two additional courses each year. In 2001 eleven of the nineteen presenters in the joint course on Economic Growth and Poverty Reduction were AfDB economists and specialists....”