

**OSCAR G. & ELSA S. MAYER FAMILY FOUNDATION**

**FINAL GRANT ACCOUNTABILITY REPORT**

**Report Date:** 1/15/2015

**Grant Amount:** \$20,000

**Organization Name:** International Development Exchange (IDEX)

**Report Author's Name:** Rajiv Khanna

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**Term of Grant:** January 2014 – June 2015

**Purpose of Grant:** To support capacity-building training for women-led social enterprise cooperatives, gender awareness workshops and village-level situational analysis workshops in Nepal in partnership with the Women's Awareness Centre Nepal (WACN).

**Measurable Outcome #1: Capacity-building training for women-led cooperatives on the importance and advantages of savings and shares in the cooperatives, major features and provisions of the Cooperative Act, organizational structure of saving and credit cooperatives, cooperative strategic planning, application processes for a loan and how it is used to generate income and accounting, budgeting and financial trainings.**

**Outcome**

**Achieved**

**Not Achieved**

**Over Achieved**

**Please provide quantitative and qualitative data/explanations to support the above.**

- WACN staff visited seven Village Development Committees (VDCs) to establish rapport with the communities.
- WACN trained 14 financial literacy facilitators (all women) during one three-day training session.
- 20 groups with a total of 360 participants (all women) participated in a seven-day financial literacy training. In addition to financial literacy training (savings groups and loan application processes), these classes also covered topics related to health, livelihood development, micro-enterprise development and skills training.
- Facilitators noted that as a result of the training, women were now keeping income and expenditure records, curtailing unnecessary expenses, calculating interest and demonstrating their knowledge of savings.
- Women are motivated to register their own savings groups.
- As a result of WACN's advocacy efforts, government banks in Nepal are opening up branches in rural areas and accepting smaller savings amounts at lower interest rates, thereby giving rural women who have been excluded access to formal financial institutions. The Nepalese government has also started to extend financial support for cooperatives, sustainable agricultural practices and small consumer shops due to pressure from WACN's membership.

**Measurable Outcome # 2: Village Level Situation Analysis Workshops: Women are engaged in analysis sessions to understand their socio-economic situation, the role of NGOs, WACN's approach and methodology, develop livelihood skills, and to introduce a holistic approach to development.**

**Outcome**

**Achieved**

**Not Achieved**

**Over Achieved**

**Please provide quantitative and qualitative data/explanations to support the above.**

- WACN conducted two seven-day livelihood development workshops with a total of 33 participants (all women) at each workshop. Participants were trained in agricultural and livestock management.

- WACN organized four Farmer Field Schools over a total of 17 weeks in order to ensure women had practical training on a full crop cycle of certain vegetables.
- Women community members were connected to facilitators from the local government offices, universities, and to members from four other Village Development Committees to increase communication and engagement across sectors.
- One Farmers' Group received 30,000 Nepalese Rupees (nearly US \$300) in support from the District Agriculture Office for a small irrigation program.
- 19 women members took part in a 35-day skills-based training in how to become a Village Animal Health Worker (VAHW).
- Women learned the importance of organic farming and have begun integrating more environmentally sound practices into their farming, including a reduced dependence on chemical fertilizers and pesticides.
- Women who were trained in the workshops began to put their new skills to work almost immediately. Through Farmer Field Schools, women experienced increased farm income and food security for themselves and their families. They also reduced their dependence on exploitative labor.

**Measurable Outcome # 3: Gender Awareness Trainings: Following the situation analysis workshops, smaller workshops are conducted in villages to highlight gender-focused solutions, which are then integrated into the savings and credit programs, anti-violence trainings and women's cooperative work. The programs and trainings lead to improved gender equality through a re-definition of cultural norms.**

**Outcome**  
**Achieved**                       **Not Achieved**                       **Over Achieved**

**Please provide quantitative and qualitative data/explanations to support the above.**

For quantitative information, please refer to previous responses. Gender awareness and training is an integral part of all WACN activities. The membership and leadership of WACN-supported cooperatives are 100% female and focus on the promotion of leadership skills for women. Women have to buy at least one share in the cooperatives; they benefit directly in the profit sharing, manage all the cooperatives and make all decisions.

However, WACN does not exclude men and encourages them to participate in programs and training. Activities carried out in the brick building factories caught the attention of several men, who want to learn more about WACN's programs and how they can be involved. Active participation from male and female members allows WACN to achieve its goal of enabling community members, especially women, to actively participate in decision-making, take on new responsibilities and to facilitate one another to become leaders. WACN reported that several women from the community demonstrated a visible increase in confidence levels and improved leadership qualities. Additionally, in collaboration with other like-minded groups, WACN has also successfully advocated for the passage of the landmark Women's Property Rights legislation in Nepal that gives married women equal property rights.

**Please itemize any changes in Executive, Board or program leadership (please state changes in personnel and rationale).**

No Changes

**Please itemize any changes in program or program outcomes (please state changes and rationale).**

WACN made an important observation during their work with communities of seasonal brick-factory workers, noting that until parents learn how to save and invest their money, they will remain dependent on seasonal labor and are incapable of sending their children to school. As a result, WACN started coaching classes to fulfill the immediate educational needs of children who are being forced to miss school due to seasonal labor. Coaching classes were held across five schools with participation from a total of 110 children. The children received coaching in Nepali, English and mathematics, subjects where children demonstrated particular need. The financial literacy component of the program will ultimately enable families to initiate their own income-generating activities and accumulate enough savings to send their children to school, but the coaching classes will fill an important gap in the interim.

**Please list any unintended outcomes (positive or negative) which were achieved.**

**Positive unintended outcomes:**

As a result of coaching classes for children, children leaving their villages to work in brick factories has decreased anywhere from 10% to 80% depending on the district. WACN, with the support of IDEX, plans to continue to build upon the success of these coaching programs.

**Negative unintended outcomes:**

While WACN's programs did not experience any negative unintended outcomes, they did experience challenges that are important to consider for future success of related programs. For example, many villagers are less attracted to agricultural work because drought, temperature increases, and overall weather unpredictability are making crop production a more risky means of increasing income. As a result, many villagers are migrating to find seasonal or foreign employment. This also made it difficult to implement the Farmer Field School courses in the program area.

**Other lessons-learned:**

- WACN's climate smart approach to agriculture and financial programs are especially relevant for rural Nepalese families to prevent migration.
- Water scarcity is one of the principal drivers of seasonal and foreign migration. Better irrigation programs can help improve this phenomenon and reduce the number of exploited brick factory workers.
- Establishing group solidarity is essential to accessing opportunities provided by local entities. Moving forward it will be important to focus on registering cooperatives and farmer groups.

**Please describe future plans for program, including funding and development of qualitative measurements of program's social impact.**

IDEX is grateful to the Mayer Family Foundation for your generous support that has enabled WACN to achieve remarkable results and impacts in women's empowerment and cooperative development. IDEX has been partnering with WACN since 2004 and during that time has built a solid relationship based on trust, learning, mutual respect and credibility. IDEX realizes that the project to promote economic, social and political empowerment of rural women and children in Nepal is a long and deep process and, therefore, we are committed to this partnership. Moreover, WACN has long-standing and robust programs in the area of cooperative economics and women's empowerment. These programs have been functioning for over two decades with active community participation.

As outlined in the recent August 2014 proposal to the Mayer Family Foundation, IDEX plans to continue and expand upon the programmatic, financial and capacity-building support to WACN. In addition to supporting the economic empowerment of women-led cooperatives, IDEX also plans to strengthen sustainable agriculture workshops and early childhood learning activities to prevent child labor and trafficking. These activities are already demonstrating measurable progress by providing additional income, food security, and skills to rural communities, as demonstrated in other areas of this report. Furthermore, IDEX will ensure the sustainability of such programs through grantmaking, building WACN's organizational capacity, and linking them with like-minded groups regionally and globally for greater impact. Finally, IDEX has successfully brokered additional resources for WACN. Recently, IDEX was able to access \$50,000 in Program Related Investment (PRI loans) for WACN.

IDEX will evaluate quantitative and qualitative impact of its partnership with WACN using the following matrix: regular communication and reports from WACN on progress of projects/activities, including key accomplishments, impacts, and lessons learned; local leadership; effective learning, monitoring and evaluation; commitment to partnership; and participatory approach. During site visits with WACN, we will interview local staff, board, and project beneficiaries to assess progress. We review changes in organizational structure, financial systems, and discuss recent achievements, challenges, and plans for the future. We also review WACN's advocacy efforts, legislation passed that affects women's economic empowerment, and election of women to decision-making bodies. For more information on impact and

evaluation, please see IDEX's Theory of Change (<https://www.idex.org/toc/>) and also IDEX's Learning and Evaluation Report ([www.idex.org/impact/](http://www.idex.org/impact/)).

- 1. Current organization operating budget from date of grant to present (actual vs. budget).**
- 2. Current project data from date of grant to present (actual vs. budget).**
- 3. Attach one "good news" article/item of your choice (optional).**

***“Good News” Item***  
***Case Study of Personal Transformation: Laxmi Lama, WACN Participant***

Laxmi Lama has spent 12 years of her life working in the brick factory. She is 26 years old and the mother of two children. Laxmi has studied until Grade 4. Her family does not have their own land so they are staying in one of the villager’s houses. Laxmi's family used to own nearly eleven square feet of land. However, before she was married over 13 years ago, her mother-in-law became ill and her in-laws took out a loan and used the land as collateral, but were unable to repay the loan and became homeless as a result.



*Laxmi with her four year old son and nine year old daughter.*

Two of Laxmi’s children are living today, a 4-year old-son and a 9-year-old daughter. She lost her first child to starvation as she was not able to produce breast milk and had no money to purchase milk. Her surviving children were able to receive milk purchased from the market with the assistance of other villagers. As Laxmi recounted her life story, her and her children’s eyes swelled with tears. She explained that she despises going to the brick factory and said, “It would be better to eat just once a day than to have to go to the brick factory, but what can I do? I am surrounded with so many problems.”

Laxmi is a regular participant of the Srijana Farmer Field School and of the Puranogau Village

Development Committee. As a result of participating in the program she has planned to stop going to the brick factory and has decided to send her children to

school. Her husband must continue working at the brick factory because they were unable to repay last year’s advance.

Laxmi was a recipient of family livelihood support (goat support) by WACN this year. She recounted that after participating in the Farmer Field School she has learned many things including the process of making organic pesticides and nursery keeping. From now on she plans to start a new life and apply her new knowledge by leasing land.

## International Development Exchange – IDEX

### FY14 Budget v. Actuals 1 July 2013 – 30 June 2014

#### *Audited*

<b>REVENUE</b>	<b>FY14 Budget</b>	<b>FY14 Actuals</b>
Foundation Grants	\$500,000	\$795,500
Individual Donations	\$300,000	\$223,968
Earned Income: Consulting Services	\$80,000	\$18,590
<b>TOTAL REVENUE</b>	<b>\$880,000</b>	<b>\$1,038,058</b>

#### **EXPENSES**

Program A: Community Self-Determination	\$260,000	\$276,585
Program B: Organizational Resilience	\$170,000	\$180,844
Program C: Global Solidarity	\$150,000	\$159,568
Program D: Social Justice Giving	\$120,000	\$127,654
Operating Expenses	\$100,000	\$106,378
Administration	\$80,000	\$85,103
<b>TOTAL EXPENSES</b>	<b>\$880,000</b>	<b>\$936,132</b>

**NET INCOME** **\$101,926**

Please see our website for our most recent FY14 Audit and 990:  
<https://www.idex.org/about/finances/>

The Oscar G. & Elsa S. Mayer Family Foundation

**WACN PROJECT DATA (BUDGETv. ACTUAL) -- January 2015**

<b>Organization Name: Women's Awareness Center Nepal (WACN)</b>	_____
<b>Program Title: Women Led Social Enterprise and Innovation in Nepal</b>	_____
<b>Program Start Date: January 2014</b>	_____
<b>Program End Date: June 2015</b>	_____
<b>All figures in USD</b>	_____

	Notes <sup>(1)</sup>	Budget	Actuals
<u>Foundation Grants:</u> <sup>(2)</sup>			
Oscar G & Elsa S. Mayer Family Foundation	Secured	20,000	20,000
IDEX	Secured	10,000	10,000
Match International Center, Canada	Secured	20,000	20,000
AEA Japan	Planned	1,000	-
<b>Total Foundation Grants</b>		<b>\$ 51,000</b>	<b>\$ 50,000</b>
<u>Government Contracts &amp; Grants:</u> <sup>(2)</sup>			
Total Government Contracts/Grants		\$ -	
<u>Total Fee for Service Revenue:</u>			
<u>Donations:</u>			
Corporate/Business			
Individuals and WACN Contributions	Secured	4,500	4,500
<u>Fundraising Events</u>			
<u>In-Kind Gifts</u> <sup>(3)</sup>			
<b>TOTAL SOURCES OF SUPPORT</b>		<b>\$ 55,500</b>	<b>\$ 54,500</b>

PROGRAM EXPENSES	Notes	Budget	Actuals
<b>DIRECT Program Expenses:</b>			
<u>Compensation Expense (by position)</u>			
Project Coordinator (1 person x \$300 x 18 months)		5,400	5,400
Total Compensation Expense		\$ 5,400	\$ 5,400
<u>Professional Services (by position)</u>			
Motivator/Trainer (3 people x \$100 x 18 months)		5,400	5,400
Total Professional Services Expense		\$ 5,400	\$ 5,400
<u>Other Direct Program Expenses</u>			
Saving and Cooperative Credit Training		18,000	18,000
Village Level Situation Analysis Training		4,500	4,500
Gender Awareness Training		9,000	4,000
Coaching Classes for Children	unanticipated outcome and project	-	9,000
Communication, Media, Documentation		8,000	8,000
Total Other Direct Program Expenses		\$ 39,500	\$ 43,500
<b>INDIRECT Program Expenses</b> <sup>(4)</sup>			
Total Indirect Program Expenses		\$ -	
<u>In - Kind Expenses</u> <sup>(5)</sup>			
<b>TOTAL EXPENSES</b>		<b>\$ 50,300</b>	<b>\$ 54,300</b>

- (1) For funding sources, please note the status of each, e.g., Secured, Pending, or Planned
- (2) For these sources, please itemize the largest single source and note the number of separate sources in each category
- (3) For in-kind gifts, please footnote the values used, e.g., the dollar amounts per hour and the hours planned
- (4) For indirect expenses, please either itemize or show the allocated percent of direct program expenses, according to your organization's overhead allocation or indirect cost recovery policy
- (5) For in-kind expenses, please footnote the cost factors used, e.g., the dollar amounts per hour and the hours planned