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**TRAINING FOR SOCIAL DEVELOPMENT  
STAFF AT THE WORLD BANK**

**The Social Development Network  
Practice Group**

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**October 2010  
(ver. 19)**

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## Background

The Social Development Family is facing a major challenge given the significant increase in lending made by the Bank in the last five years. Lending overall has more than doubled between FY05 and FY09, investment lending has increased by 82% and infrastructure lending by 125%. DPLs have also increased. All these operations demand the inclusion of adequate social development measures to address impacts, mitigate risks and develop new opportunities. Additionally, infrastructure operations often require land acquisition, causing involuntary displacement, and could affect indigenous peoples, thereby triggering the Bank's social safeguard policies (OP/BP 4.12 and OP/BP 4.10). Many projects also trigger OP/BP 4.01 (Environmental Assessment), which requires a scoping exercise to identify issues of concern to various stakeholders as well as consultations with affected populations as the project design takes shape. All these activities require the expertise and guidance of social development (hereinafter, SDV) specialists.

The Bank has also faced an increasing number of Inspection Panel requests and investigations, often relating to the social safeguards policies. Additionally, IEG has recently released a report entitled "Safeguards and Sustainability in a Changing World" (May, 2010). In this report, IEG suggests that the World Bank's safeguard policies are "unbalanced" and narrowly conceived even in comparison to other MDBs. The report challenges the Bank to consolidate and update its social policies <sup>1</sup>

*The World Bank should: update its safeguards policies to ensure adequate and balanced coverage of social and environmental effects, including by integrating labor and working conditions, community and gender impacts, and health, safety and security issues ... /... Consolidate social policies by integrating existing safeguards with other World Bank Group policies on social risks under one umbrella social policy to enhance efficiency and alignment [IEG, May 2010, p120]*

The growth in projects requiring SDV inputs has far outpaced the availability of staff to handle them. While demand for its services is increasing, the available SDV staff is not growing at the same pace and staff skills are not keeping up with the demand. There is increased demand for staff who can address both social safeguard policy issues as well as broader issues of social sustainability in operations, including DPLs. Some regions face major staffing constraints in addressing issues related to social sustainability and safeguards. IEG (op. cit) observes,

*At the WB, staff capacity is unevenly distributed across the regions. . . . . The skills deficit is further compounded by the increasing separation between environmental and social staff who work on safeguards and those who work on other environmental and social issues which are perceived as being professionally more satisfying [IEG May 2010, p. 119].*

To provide a Bank-wide platform for articulating and addressing the operational dimensions of social sustainability and to help task teams enhance social opportunities and mitigate social risks, including but not limited to those covered by the Bank's social safeguard policies, a Social Sustainability and Safeguards Practice Group was launched by the SDN Network last year (FY 2009).

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<sup>1</sup> At the present time, IEG's recommendation is unlikely to be implemented in a formal sense. Adopting or modifying existing policies has proven to be a slow process at the World Bank, stretching over years. Nonetheless, to the extent that IEG's recommendation resonates with the Bank's Board and management, in the long run, fulfillment of this recommendation would greatly expand the scope of SDV work and the demand for its services.

The Practice Group has proposed to develop and roll out a core training and accreditation program on social sustainability and safeguards that will be mandatory for all SDV staff. This proposal has been endorsed by the SDN council.

### **Accreditation**

It has been suggested that all SDV staff be expected to have basic familiarity with concepts and techniques in a range of social science areas in order to correctly identify issues and, when necessary, refer clients to appropriate specialists both internal and external. An accreditation program should be help to deal with the challenges faced by the social development familysuch as: lack of skills to operationalize social sustainability at the project level and insufficient SDV staff with safeguards skills,.

The basic idea presented here is to provide a training program that will insure a standard level of knowledge and experience for all SDV staff based on formal training, mentorship and actual field experience. Full specialist status would be achieved mainly by accumulated experience and recognition in such areas as youth and violence, fragile and conflict-affected states, CDD, safeguard policies, etc.

SDV needs both generalists and specialists; generalists would have the capacity to manage basic issues to assure social sustainability and safeguard compliance. Generalists would also be familiar enough with specialized areas to be able to make appropriate referrals to specialists when necessary. Specialists would be recognized as the “go-to” staff members for assistance with unusual problems and design of projects that focus on social issues.

Accreditation implies that there are agreed standards against which staff can be measured regarding their capacity to satisfactorily carry out Bank lending and analytic activities. SDV and OPCS have begun work on defining core competencies, as well as operational and technical competencies for specific purposes (see below).

### **Objectives**

The purpose of this paper is to present a Concept Note on core training and accreditation program on social sustainability and social safeguards to Bank staff, including a comprehensive proposal of the training and program, main objectives, content and scope of the course (social sustainability, social analysis social assessment, demand for good governance, youth, gender, “fragility, conflict, crime and violence”, social impacts of climate change, community driven development, social safeguard policies - involuntary resettlement, indigenous peoples, cultural property-) target audiences (mainly SDV staff, but also selected TTLs), duration and methodologies according to the audiences, and estimated budget.

### **Methodology**

The methodology of the present work involved the distribution and compilation of a questionnaire, the holding of focus groups among various staff members, interviews and the collection of information regarding training that has been or is being offered to staff on SDV issues. Further details on the methodology employed are in Annex F.

## Principal Recommendations

1. Staff training is only one necessary aspect of staff development. To meet institutional goals, it is necessary to consider human resource needs Bankwide and at the VPU level and to align recruitment targets, incentives, promotions and staff rotation, along with training. This implies a more focused and integrated approach to staff development than is currently in place, including the Bank's field offices.
2. Training would form part of a broader approach to staff development that includes needs assessment, consistent guidance of SDV staff by their supervisors, and periodic evaluation of progress towards the achievement of qualitative and quantitative targets measurable by aggregate levels of accreditation achieved by SDV staff.
3. Staff are practically unanimous in stating that the most effective training tool is actual participation in operations as part of task teams -- in other words, on-the-job training. A one-week training program (Annex B) together with mentoring and structured experience are suggested for imparting the basic core skills for SDV staff.
4. An accreditation system is suggested (as required by the TOR) that assures that every accredited SDV staff is be familiar with all of the fundamental areas of social development and could guide task teams to the best sources of advice on any of these areas (see Annex B). Basic core training would be provided to new SDV staff, staff converting to SDV from other areas and staff requiring reinforced training to fulfill the new challenges of lending, policy analysis and advice required in today's Bank. Staff would not be accredited at the specialist level. However, it would be expected that all SDF staff specialize in one or more "Advanced Areas" of SDV practice (see Annex A). In general, all GF and GG staff would be expected to be accredited while senior GG and GH staff would be expected to hold "specialist" status.
5. Training at all levels should be implemented in conjunction with structured mentoring and practical experience.
6. Advanced training would be implemented beyond the basic level on a basis of institutional need as identified Bankwide or at the VPU level.
7. Existing training is generally adequate at the introductory level for preparing non-SDV staff as an introduction for SDV staff for their roles but it generally does not, in itself, provide adequate preparation for playing a professional review or advisory role.
8. All advanced training should include periods of mentorship and field experience that would complement the formal training, workshops, etc.
9. SDV staff need training in some highly technical areas such as quantitative analysis, survey methodology, policy analysis. This need can be filled by recruitment of trained, experienced specialists or by training of existing staff. However, the kind of training that may be required for these areas is not available in the Bank. Therefore it may be necessary for SDV to consider supporting staff training at institutions outside the Bank.
10. Evaluation of training should be strengthened beyond the customary end-of-course questionnaire to include ex-post evaluation and performance evaluation of trainees.
11. The SDV board may wish to propose that some SDV staff be partially exempted from normal staff rotation in order to get maximum benefit from SDV staff familiarity with local languages and social behavior.

## Perceptions of SDV Staff

Perceptions of SDV staff have an impact on training and readiness for operational work. SDV staff, responding to a questionnaire and in focus groups spoke of bias against inclusion of SDV staff on operational teams. (See Annex I for a detailed discussion of this issue). There is a need for SDV staff to acquire excellent skills not only in social development but also in specific sectoral areas (e.g. transport, health, etc.) so that they will be perceived as useful contributors to project design. While safeguards are an important part of SDV work, SDV specialists need to demonstrate their capacity to contribute to overall sustainability in order to overcome the perception that they only function in the safeguard review function. The perception of SDV staff has a direct impact on skills acquisition. SDV staff are often called to serve on task teams at the last moment and do not participate in all preparation missions.. This has the effect of depriving them of valuable experience (see Annex I).

## Training Gaps

A glance at the availability of courses in Annex D (column 3) will show that there is a plethora of training available in Social Development and related fields, offered by SDV, QACU, OPCS, PREM, regional VPUs and others. What accounts for the perception then that SDV staff are unprepared to tackle issues pertinent to DPLs, economic policy and other areas, according to responses to questionnaires?<sup>2</sup> There are several possible explanations, all of which are plausible and which are not mutually exclusive. Table 1 presents some of the problems that constrain the readiness of SDV staff and some potential solutions.

**Table 1 – Possible Reasons for Training Gaps and Potential Solutions**

Possible Problems	Potential Solutions
1. Most training in safeguards and SDV-related topics is aimed at a general level, not at the acquisition of expert skills.	Provide intermediate and advanced level training for SDV specialists. See Annexes B and C...
2. Training participants are often consultants, JPAs and ACS who will have few opportunities to use the training. Senior-level staff do not avail themselves of training as often as do junior and transitory staff.	Encourage level G and H SDV staff to broaden their skills (and thereby to become more fungible) by taking advanced level training. Supervisors, such as SDV Sector Managers can ask staff to include advanced training as part of each staff member's OPE exercise and follow up to be sure it has been complied with.
3. Most training courses consist of one day or half-day sessions. Assigned readings are often handed out on the day of the training. The take-away from such courses may consist of little more than some Power-Point handouts.	Offer advanced training (see Annex A) with required readings, multi-day presentations and structured follow-up such as participating actively in workshops, mentoring or field work.
4. Course evaluations are perfunctory and consist of questionnaires hastily filled out at the end of the training sessions.	Evaluate training six months later to ascertain how much the trainee has retained. Evaluate job performance related to training taken.
5. SDV staff lack opportunities to participate in project design and preparation while such experiences are critical to the acquisition of skills.	Implement mentoring programs and encourage management, especially sector managers, to insist on SDV participation in project design.

<sup>2</sup> There are differences in the responses of SDV staff and those of non-SDV staff. SDV staff tend to identify training gaps in such areas as CDD, participation, gender and conflict resolution. Non-SDV staff, on the other hand, are more likely to identify gaps in the areas of quantitative methods, macro-economics and policy analysis., particularly those involved in PSIA and DPLs.

## Current Levels and Capacity of SDV Staff

There are currently some 165 staff mapped to the SDV family. In addition, there are a number of ETCs and an unknown number of STCs working to support operations and carrying out studies. In general, it appears that SDV staff are not only few in numbers but also tend to be outranked by professionals in other sectors. The distribution of SDV staff compared to PREM staff within the grades is shown in Table 2.

As can be seen, SDV staff and ETCs are relatively few in number and are under-represented at the higher grades compared to economists (staff mapped to PREM<sup>3</sup>). This may be partly a reflection of the fact that SDV is a relatively new area in the Bank. The first non-economist social scientists joined the Bank in the 1970s and their numbers have not kept pace with overall staff numbers. However, the relative overrepresentation of SDV staff in lower grades means that there is probably cumulatively less experience in the SDV family than in other, more established sector families.

Table 2 shows the distribution of mapped to SDV by grade.

**Table 2-- Distribution of SDV vs. PREM Staff by Grade**

	Grade Level													
	GF		GG		GH		GI		GJ		GK		Total	
PMU	N	%	N	%	N	%	N	%	N	%	N	%	N	%
SDN-SDV	48	29.1	93	56.4	23	13.9	1	0.6	0	0	0	0	165	100
PREM	134	20.6	310	47.5	168	25.8	34	5.2	5	0.8	1	0.2	652	100

SDV staff are more junior than PREM staff. Of SDV staff, 85% are level GF and GG, while only 14.5% are above that level. In PREM, 67.8% of staff are at levels GF or GG<sup>4</sup>, while, 32.2% are above this level. While the difference is not overwhelming, it could be a contributing factor to the perception that SDV staff are relatively less experienced compared to economists and other professional staff. In simple terms, junior staff are less likely to be assertive and their advice less likely to be heard on a task team.

## The “Core Competencies”

SDV, in collaboration with OPCS, has begun a process of defining core competencies for various technical specialties in the Bank, including Social Development. The materials shown in Annex A are drawn from a draft document that identifies the core skills divided into three broad categories: behavioral, operational and technical competencies. Behavioral competencies are defined as Client Orientation, Drive for results, Teamwork and Inclusion, Learning and Knowledge-Sharing. While some of these competencies can be imparted through training, some may be more personal characteristics of each staff member that can be enhanced by management, human resource actions and appropriate incentives. For example, management of operations often calls for delicate diplomacy between TTLs and their counterparts in client governments. TTLs need to strike the appropriate balance between firmness and flexibility in each situation. Tensions naturally arise in task management such as when a project falls

<sup>3</sup> The comparison is not strictly between equivalents. The designation SDN-SDV refers to staff mapped to SDV consisting largely (but not exclusively) of social scientists) while PREM is staffed primarily (but not exclusively) by economists.

<sup>4</sup> Data courtesy Samantha Forusz (HRSAS) and Sandor Vegh (HRSAS)



significantly behind schedule or disbursements are lower than predicted. Each situation is unique so there is no formula for resolving all such problems. The behavioral competencies were therefore omitted from this discussion of training. The Bank does offer training in areas such as leadership (Task Management Workshops Modules I and II) time management, and other areas. Although there is agreement that training in mediation and conflict resolution would be useful, it does not appear that the Bank offers training in this area.

Other competencies are defined as operational (See Annex A). These competencies refer to the need for judgment in the management of Bank operations. They were identified by SDV in collaboration with OPCS. They are acquired mainly from experience and by modeling behavior that occurs through formal and informal mentoring. The alternative approaches to solving such problems can be discussed in training sessions and case-based workshops, but they are most readily acquired in actual practice. In the third column – “Implications for Training” – there are indications of the existence of training inside the Bank that addresses the particular area or areas. In many cases, training is offered and seminars are presented that are organized families and VPUs outside of SDV, such as PREM.

Technical competencies are defined by SDV/OPCS in greater detail (see Annex A). In the draft document, OPCS states that two basic technical competencies would be required of all SDV staff, namely:

- Social Development Analytical Tools and Policy, Institutional, and Operational Applications
- Social Safeguards: (OP/BP 4.10 – Indigenous Peoples; OP/BP 4.12 – Involuntary Resettlement; OP4.11 (Physical Cultural Resources)<sup>5</sup>.

The additional five technical competencies identified can be applied as needed for a given position in which a specialty is required. Although the competencies identified by OPCS are highly relevant to many Bank operations, the operational and technical skills do not exhaust the areas in which senior Bank staff identified needs for social development inputs. Annex A includes these competencies as well.

The discussion above regarding the negative bias of many staff towards social development is highly relevant to the training of SDV staff. In order to overcome this bias, several SDV colleagues suggested that SDV staff should improve their capacity to offer services demanded by colleagues in other sectors. They argued that SDV staff need to improve their technical skills as well as their command of sectors outside their own. Having technical skills as well as knowledge of other sectors is fairly common among Bank staff. For example, nearly all specialists in transportation have both engineering background and analytic skills in microeconomics and finance. Possessing these skills and knowledge can greatly amplify the power of social analysis regarding other sectors of the economy as well as services such as health and education.

In Annex A, we summarize additional competencies that have been identified by staff in various parts of the Bank including the center and all the VPUs who responded to questionnaires, participated in focus groups or were interviewed. This list is selective and does not cover every area identified by respondents. The selection criteria were (a) the issue was mentioned by several different staff members and (b) the

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<sup>5</sup> Physical Cultural Resources is not always counted as a “social” safeguard.

respondents presented cogent arguments for including these areas in staff training. It is difficult to say whether this list is the “correct” or the definitive list. Different specialists will have different opinions on what is “core” and what is secondary. However, the list reflects the opinions of both SDV and non-SDV staff. As mentioned above, SDV staff tended to prioritize areas such as gender, equity, participation and violence and conflict while non-SDV staff were more likely to identify gaps in areas such as quantitative methods, policy analysis and macro-economics but there was overlap between the two.

In the third column – “Implications for Training” – there are indications of the existence of training inside the Bank that addresses the particular area or areas. In many cases, training is offered and seminars are presented that are organized families and VPUs outside of SD, such as PREM. There is some overlap between different VPUs and also among several of the areas identified in Annex A. For example, while OPCS conjoins youth and gender issues under a single rubric, “Social Inclusion,” we have disaggregated these two areas of concern.

## **Safeguards**

Perhaps the most clearly defined area of activity for SDV staff is the application of social safeguards. In this regard, the role of SDV staff falls into two broad categories: operational roles and the review function. There is also a role for SDV staff in the evaluation of the effectiveness of safeguards in achieving their broad policy objectives.

Operational Activities as Member of a Task Team: Participation in a task team is one of the most important activities in which SDV staff engage. As discussed above, SDV staff are not always welcome on task teams. The responsibilities of SDV staff are more broadly defined than for other members of a task team. This is because pertinent social issues may arise in virtually every aspect of project design and implementation. They may relate to the question of who benefits from a project and who does not, who manages a project and where decisions are taken, how a project affects different ethnic groups, genders or social classes, how the response of different social groups could affect the project itself, how the project team can best communicate with stakeholders, etc. As mentioned previously, timing is a key issue. If an SDV staff member (or consultant) joins a team at the outset of preparation, there may be time to learn as much as possible about the social milieu in which the project would be implemented and to identify issues that may require a closer look. In many, if not most cases, an SDV staffer may need to make the case for a social assessment.

Review Function: Many SDV staff participate in their respective regional safeguard teams. This activity affords an excellent opportunity to be in touch with the kinds of projects that are being presented, at least at an early stage of preparation (PCN). Safeguard teams are responsible for ascertaining whether the social safeguard policies are triggered (OP/BP4.10; OP/BP 4.12 and OP 4.11).<sup>6</sup> The criteria for whether or not the safeguards are triggered are fairly explicit in the policies themselves, but there is often uncertainty at the PCN-stage.

These two situations – uncertainty regarding whether to trigger a policy and whether a policy framework is the appropriate instrument – often require fine judgments to be made and require discussions with the

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<sup>6</sup> It is worthwhile to mention that service on a safeguards team is not perceived by many staff as career enhancing. As observed by the IEG report cited above, many staff avoid working with safeguards because it requires them to make judgments about their colleagues’ work.

task team. This is an area where experience is invaluable to make such judgments. While formal training can help, it is useful for SDV staff to be immersed in actual cases in order to develop the acuity needed. QACU offers frequent training courses in the social safeguards. These are usually one-day courses aimed primarily at operational team members who need to understand the safeguards in order to correctly identify safeguard issues and how to manage the safeguards process. It makes sense for SDV staff to partake of these training courses, but they will generally fall short of the level of expertise required for SDV staff to serve either as gatekeepers or operational staff. Service on safeguards teams is, in itself, excellent training for SDV staff because it offers an opportunity to become familiar with a wide range of operations and the safeguards issues they pose. Training can also help to homogenize Bank practices across VPUs in order for treatment of similar issues to be consistent in different regions.

Because safeguard staff must make judgments regarding whether or not a given policy is triggered and, if so, they must help determine the environmental category and the nature of any risk, safeguard staff have a gatekeeper function at least for a brief period when these decisions are taken. Safeguard staff are frequently approached by operational staff for preliminary opinions about project design. Some examples of informal consultations are shown in Box 1. Often team members poll a number of different specialists to see if they can get another response more to their liking. This is known as “opinion shopping.”

**Box 1 – Some typical questions regarding social safeguards.**

- My project will involve a small number of families that will have to move away from the project area, but they live in terrible conditions and they are anxious to move. Does OP 4.12 apply to voluntary resettlement?
- If people move away from the project area before the project starts, does OP4.12 apply?
- Can I revise the same IPP for Country Y that I used in Country X, just changing the names? The IPP for country X was considered to be “state of the art.”
- The government refuses to compensate squatters for the land they occupy because it cannot legally pay for something that a person does not own. What should I do?
- There is a group of so-called indigenous people who live on a reservation created by the government but they all speak the national language and are embedded in the regional economy. Does OP4.10 apply?

The kinds of questions that are asked, and the context in which they arise, highlight the need for training and experience for SDV safeguard staff. It is not uncommon for differing opinions to be cited by TTLs as evidence that decision making in SDV is inconsistent.

**General Social Assessment and DPLs**

Social assessment is intended to improve design, involve concerned stakeholders, and strengthen sustainability of benefits: (see Box 2)

## Box 2 --The Social Assessment Process

*Social assessment . . . is the instrument used most frequently by the Borrower to analyze social issues and solicit stakeholder views for the design of Bank-supported projects. Social assessment helps make the project responsive to social development concerns, including seeking to enhance benefits for poor and vulnerable people while minimizing or mitigating risk and adverse impacts. It analyzes distributional impacts of intended project benefits on different stakeholder groups, and identifies differences in assets and capabilities to access the project benefits*

*A social assessment is made up of analytical, process, and operational elements, combining (a) the analysis of context and social issues with (b) a participatory process of stakeholder consultations and involvement, to provide (c) operational guidance on developing a project design, implementation, and monitoring and evaluation (M&E) framework. Bank staff then (a) provide guidance and technical assistance to the borrower (and consultants) to undertake the social assessment, and (b) verify, assess and appraise the Borrower's social assessment findings, as an integral part of their social analysis.*

Bank social scientists typically use one or more of the following five “entry points” for social analysis:

- Social diversity and gender*
- *Institutions, rules and behavior*
- *Stakeholders*
- *Participation*
- *Social risk*

[from: Social Analysis: A Sourcebook. World Bank 2003]

Operational Policy 8.60 requires that DPLs include an analysis of the social impact of the policy reforms that are supported by each operation. The OP also requires stakeholder consultation and participation in the formulation of policies. Although a Poverty and Social Impact Analysis (PSIA) is not required, OP 8.60 states that it is highly desirable to undertake one to underpin the DPL. Experience shows, however, that very few DPLs include a thorough analysis of social impacts, such as, for example, the distributional effects on income of fiscal policies.

Often DPLs are expressly aimed at economic growth and economic efficiency such as the recent spate of DPLs aimed at increasing “competitiveness.” While most social scientists agree with economists that growth is a desirable goal, there has been a long-standing demand for “growth with equity,” and for growth that does not create or deepen gaps between rich and poor. There is also evidence that high levels of inequality promote instability, particularly in societies where modern communications generates a tide of “rising expectations.”

The lack of thorough social analysis in DPL Project Document may be attributed to two main causes: one is the relatively low priority assigned to social impacts by many task teams, and the other is the fact that

some SDV staff are not prepared to undertake the analysis necessary. There also have been some complaints about the poor quality of social analysis that appears in various documents prepared by and for the Bank. For example, the required socioeconomic analysis in Resettlement Action Plans (RAPs) often amounts to little more than a recitation of statistics on demography, education, health levels, etc. The same comment can be made regarding social assessment in Indigenous Peoples Plans, DPL Project Documents and other critically important documents.

### **Training in Social Science and Broad Knowledge of Social Issues**

Social science has many tools for the analysis of social issues. The proper selection of tools requires a broad knowledge of social science and the methods appropriate to each problem. Perhaps the most important first step in any social analysis is problem definition. Often there is a disconnect between the stated Development Objective of a project and the formulation of problems. For example, the development objective of a road project may be to reduce the costs of bringing farm produce to market. The perspective of the engineer may be to provide the best possible technical solution to transportation within a given cost envelope. The perspective of the economist may be to improve market conditions by lowering transport costs, resulting in greater satisfaction of consumer demand and a more efficient market.

Understanding the linkages between the macro-economy, communities and different social groupings can be critical in mitigating adverse impacts of technological change. It sometimes appears that social analysis is inherently conservative, especially in situations where analysis concludes that social change will be disruptive of “traditional” Social analysis can also help to reveal opportunities and alternatives to costly social programs or to anticipate costs that are likely to arise from unexpected consequences. Attention to social organization and to community preferences can often lead to the adoption of policies that increase the growth potential of communities and regions.

The tools needed by a social scientist to analyze such a situation include, first, a capacity for problem formulation that takes social issues into consideration. This flows from looking at how a society is segmented by gender, ethnicity, caste or class. This perspective is complementary -- not opposed -- to an economic or engineering perspective. This perspective may lead to different solutions than those proposed by other development professionals or it may lead to the incorporation of additional measures to mitigate potential adverse impacts or to enhance the benefits.

Part of the training that SDV specialists need to acquire is the ability to detect both risks and opportunities in a given situation. The capacity to do so is not an exclusive gift of SDV but the tools and perspective of social specialists will often make it easier for them to identify such conditions. Among these tools is the ability to talk to people and find out what their perceptions, fears and motivations are. A social scientist may look into gender differences, for example, as regards a health care system. Avoiding risks and seizing opportunities goes to the very heart of sustainability. Understanding how people feel about a particular innovation or change is a valuable piece of knowledge that should be part of every development endeavor. Acquiring the skills to build that understanding is a goal towards which the SDV family should strive.

## Country and Sector Knowledge

It is a commonly observed that the Bank undervalues country knowledge. Bank staff are regularly thrown into situations in which they do not speak the local language and where they have had no prior experience. This is an inevitable situation in a Bank with operations in more than 100 countries. However, it is usually essential that at least one person with local knowledge and the ability to speak a local language be involved in the preparation of projects, social assessment and ESW. Where there is no SDV staff available, local social scientists should be recruited to assist in the collection and interpretation of social data.

Rotation of staff among regions is generally required by Bank HR policies. As a result, many staff who have been steeped in the language and culture of a particular region find themselves in an entirely new region where they are obliged to acquire a great deal of new knowledge. Rotation carries major benefits, including bringing a fresh perspective to problems, thus promoting shared experiences across regions and greater consistency in the application of policy. Staff themselves has often found transfers to other regions to be eye-opening and valuable to their professional development. On the other hand, there are some downsides to rotation, particularly in the case of SDV staff whose regional knowledge and language skills give them a great advantage in their ability to understand social issues in a particular region.

## Tools and Training

The basic skills required of a social scientist to contribute positively to a development project or program can be summarized as follows:

- a) An **analytic perspective** that identifies the social impacts of proposed programs, particularly with respect to livelihoods, religious and other cultural preferences, and gender;
- b) **Tools** that allow the precise characterization of the social issues involved, through the use of surveys, direct and indirect observation, qualitative techniques (e.g. focus groups, key informant interviews) and quantitative methods (e.g. regression analysis);
- c) Ability to **integrate** social science findings with the economic and technical perspectives, including the capacity to make judgments regarding the magnitude of risks such as those arising from conflict, loss of livelihood, opposition to the project, social exclusion and others.
- d) The ability to **propose solutions** to problems and to use data, analysis and persuasion (when necessary) to make the case for building a social perspective.

The foregoing is intended to show that SDV specialists often cannot simply be **trained** in certain skills (e.g. quantitative methods) and then be expected to perform effectively in the Bank setting. Building a capable staff will certainly require a combination of formal training (e.g. in classrooms and workshops) and opportunities to acquire experience in Bank operations. Therefore, the current concept note emphasizes that both training **and** opportunities to acquire experience in operational settings are essential. As will be argued below, a learning program should be integrated with long-range planning activities that consider recruitment, rotation, advancement and continuous learning to respond to new challenges as they arise.

## Training Gaps

Among the tools social development specialists need are data collection instruments, methods for data analysis, quantitative analysis, an understanding of economics sufficient to integrate social with economic analysis.

Staff who were polled, interviewed or consulted stated that SDV specialists frequently lack the experience and knowledge required to be effective participants in Bank operations. Discussions with non-SDV staff suggested that there are two broad areas where gaps are identified.

- General knowledge of Bank policies, procedures and processes regarding investment projects, DPLs, and sector work. The lack of these skills can be attributed in part to the fact that SDV staff or more junior and that some are not involved in operations as TTLs.
- Policy analysis, macro-policy, general economics; taxation and finance; Some staff involved in preparation of DPLs commented that SDV staff were not always up to the task of analyzing the social dimensions of poverty and the policies proposed in DPLs as required in OP8.60.

**Specific skills including quantitative methods, policy analysis.** This relates to the previous comment. Social analysis sometimes requires the collection or analysis of data from censuses, household surveys, education data, health data, etc. Sometimes this data is coded in such a way that requires using proxies for social variables that are of interest. Often, drawing conclusions requires the use of regression analysis or other forms of quantitative analysis including tests of significance. Social analysts should also be able to assess the validity of data presented in support of one or another conclusion. Another useful skill which most SDV specialists lack is familiarity with GIS methods and the use of spatial data in social analysis. Survey design is also particularly important when primary data collection is called for as part of sector work or in project preparation.... SDV staff should be trained in the design, pretesting, coding and analysis of questionnaire data. Unfortunately, no training is available within the Bank on the design and implementation of surveys. Additional areas of knowledge that are important for SDV specialists are:

- Detailed knowledge of safeguard policies and procedures. Although many SDV staff work on social safeguards, some are not fully aware of the application of the Bank's safeguard policies, especially in limiting cases such as land management projects.
- Skills in helping to guide policy dialogue, participation, consultation. This involves knowing how to frame and organize public consultations, to assure that all stakeholders can be heard and assuring that the opinions expressed in such consultations are considered by decision makers. SDV staff often need to sensitize clients and colleagues to differences arising from gender, ethnicity, language or religion. They must be aware of and able to present situations of elite capture, benefit leakage,
- Familiarity with CDD, DFGG, Climate Change Issues
- Experience with exclusion/Inclusion especially with respect to gender, ethnicity, youth issues, and religion.

## Filling Gaps

In the remainder of this report, several strategies for filling the gaps discussed above will be presented. These strategies include both training modalities (e.g., formal courses, field-based workshops, mentoring arrangements, etc.) and various non-didactic approaches (including systematic needs assessments and reviews of staff qualifications). General knowledge which is a prerequisite for the proposed accreditation scheme proposed below (see Accreditation: a Tentative Design). In preparing this report, it became apparent that there are gaps in the training of SDV staff that cannot be met by the traditional 1-day course at the Bank, particularly in order to achieve the expert level that is demanded by consumers of SDV service..Some staff members suggested that ensuring an adequately trained SDV staff is largely an HR function and that greater attention should be paid to staff qualifications and network needs *before and during* recruitment. This matter should be taken up by the SDV Board. Recruitment of new staff should be oriented to the skill-mix needs identified among the SDV staff.

There are some levels of expertise that probably cannot be present in every VPU, such as high-level skill in statistical analysis. One suggestion is to recruit a few experts in high-level analytic areas for the SDV anchor and make them available to SDV staff in the regions for consultation, coaching and technical assistance. Among the areas for which high-level experts in statistical analysis, macro-level policy analysis, finance and budget and other areas where Bank training is likely to be insufficient to bring staff up to a high level of competence. These staff members would serve in the anchor and be at the disposal of operational staff who need their specialized services. A word of caution is needed here. Staff recruited for the anchor typically become involved in research defined by the SDV anchor, thus limiting their availability to TTLs. The incentives for anchor staff lie in the direction of producing original studies and not in service to operational staff. A number of TTLs commented that, when needed, an SDV specialist is frequently not available. If specialists are recruited to fill gaps in staff training, they will need to be managed carefully to ensure that their services are truly available to teams on a timely basis.

## Training Modalities

Training is often understood as completion of formal training courses offered by the Bank and elsewhere. However, in the course of this exercise, several other modalities of training were identified. Many of these are practiced in the Bank, formally or informally. All of them have the potential for raising the level of preparedness of Bank staff to carry out tasks required in the fulfillment of their duties. Among the various modalities identified are the following:

1. Formal Training Courses in the Bank
  2. Training outside the Bank
  3. Participation in Seminars, Workshops, Brown-bag Lunches and similar events;
  4. Participation in ongoing “practice groups” and similar groups;
  5. Mentoring and apprenticeship
  6. Field-based workshops
  7. Indirect exposure to Instructive examples through informal discussions, review of project documents participation in PCN, QER and Decision meetings; use of sourcebooks
1. **Formal Training Courses:** Annex A provides references to a substantial number of training courses offered by various divisions of the Bank such as QACU, PREM, and SDV. These courses are



mainly aimed at operational staff in the Bank rather than specialists. They are mostly designed to provide basic knowledge of Bank policies and their application as well as to highlight emerging issues such as gender inequality that are of concern in poverty alleviation. They serve to sensitize staff to the issues involved in, say, resettlement. Virtually none of the basic Bank courses would be sufficient to bring SDV staff up to an “expert level”. However, *it is recommended that -- early in their careers -- all SDV specialists take the basic courses in such topics as the social safeguards (Indigenous Peoples, Involuntary Resettlement, Physical Cultural Resources), Environmental Assessment, preparation of ISDSs, as well as broader social sustainability issues, such as gender, Governance and Anti-Corruption (GAC), Social Dimensions of Climate Change, Fragility and Conflict*. The Bank also offers language training in many different languages.<sup>7</sup> There are often charges for courses but generally nominal or zero, often with a chargeback only in case of no-shows.

2. **Training outside the Bank.** Specialized training is available at the university level outside the Bank both in the headquarters region and around many of the field offices of the Bank as well. SDV staff can avail themselves of such courses as quantitative methods, survey design, gender relations, peoples and cultures of specific regions and cultural resource management, political economy, and financial analysis. At present, there is no standard way for the Bank to pay tuition charges for such instruction. This training will typically involve a four-month or full year duration, but more concentrated instruction may also be available. *It is recommended that SDV develop a model for (a) assessing the need for advanced training for individual staff members, (b) assessing the value of particular offerings to meet the Bank’s operational needs; (c) providing released time and tuition support for staff enrolled in such courses.* The last (c) can be problematic if a staff member has an active travel schedule. For staff who travel a great deal, it may be necessary to seek out concentrated courses offered over a one- or two-week period. *In some cases, SDV can hire specialized instructors at the university level to offer courses of instruction on a tailor-made basis that will fit into the travel schedules of SDV staff.*
3. **Participation in Seminars, Workshops Brown-bag Lunches and similar events...** While these are not, strictly speaking, training events, there is a rich variety of events held every week at the Bank, many of which are invaluable for the socialization of SDV staff and their acquisition of knowledge, particularly on the cutting edge of development lending. For example, there is a weekly list-serve available in the Bank on Climate Change Events (contact [climatehelp@worldbank.org](mailto:climatehelp@worldbank.org) or - [pbraxton@worldbank.org](mailto:pbraxton@worldbank.org)). *It is recommended that SDV staff confer with their supervisors (or training coordinators) and make up a list of events pertinent to their particular interests and expertise. Participation in a certain number of such events should be considered mandatory as part of staff training.*
4. **Participation in ongoing “practice groups” and similar groups.** There are a number of “practice groups” and “study groups” – such as the Conflict, Crime, and Violence working group, consisting of about 50 members – that meet informally throughout the year in the Bank to discuss specific issues. It is beyond the scope of this paper to identify such groups. However, *it is recommended that SDV staff be strongly encouraged to seek out and participate in one or more practice groups with colleagues in sectors pertinent to their interests, e.g. water supply and sanitation, elementary education, social protection, etc.*

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<sup>7</sup> Immersion language training regularly offered through the “Language and Culture” program in Arabic, Chinese, French, Portuguese, Russian, and Spanish. Instruction in other languages may also be available. <http://go.worldbank.org/G8M29MHK20>

5 **Mentoring and apprenticeship.** This non-didactic modality of training is widely discussed inside the bank and is regarded as one of the most effective ways of preparing staff for the roles they will play in operations. The Bank has sponsored a “Regional Mentoring Program.” Details are available on the intranet (see Box 3). The program is aimed at new staff who have recently joined the region or a department; experienced staff changing their role; staff who will be working in a new country or on a new topic and need some kind of "guided immersion.”

### Box 1– Regional Mentorship Program

#### Regional Guidelines for the Mentorship Program

- Sector Managers (SM) are responsible for identifying the staff who will benefit from mentoring and also for helping to identify appropriate mentors.
- JPAs and ETCs, because of their limited tenure, are not eligible
- ACS staff are eligible
- Mentors cannot provide inputs to their mentee's OPE and SMs cannot ask mentors feedback.
- Mentees should include their participation in the program in their individual learning plans
- Mentors can include their participation in the program in their OPEs
- Mentoring funds can be used to **cover mentor's time** and variable cost (travel in economy class) for both mentor and mentee.
- Mentoring funds **cannot be used** to cover mentee's time.
- The program must be fully inclusive with respect to staff based in Country Offices-- the telementoring option has worked successfully when pairs are really committed to the program. Videoconference costs can be financed by the Mentoring Program.

Source: <http://go.worldbank.org/JDKEYGEGH0>

6. **Field-based “hub” workshops.** In recent months, some Country Departments have organized field-based safeguards workshops, sometimes known as “Hub Training,” in which they bring together specialized Bank staff, project TTLs, members of Project Implementation Units (PIUs), local consultants and other resource people. Annex H presents the program from a workshop recently held in Brazil. This modality of training is an opportunity for actors from various perspectives to join together for a substantial period and learn from each other. The focus of such workshops has, so far, been on safeguard policies. However, there is no reason why similar workshops cannot be organized on a CD or regional basis to bring together Bank staff, counterparts, non-Bank consultants and others to learn from each other.

### Managing Staff Development

Training is basically a tool for staff development which can be defined as strengthening the capacity of the institution to carry out its mission through the development of knowledge, skills and professional behavior. Training needs to be set in a context of individualized planning to meet the needs of the Bank, while at the same time, building on the strengths and background of each SDV staff member. *In this respect, we recommend that the SDV Board implement a training program consisting of the following elements.* Some aspects of the following program are already in place.

1. Systematic Needs Assessment by VPU and at the anchor level
2. Review of Staff Qualifications
3. Gap Analysis: confronting demand with supply
4. Annual Staff Development Plans
5. Feedback to recruitment and rotation policies.
6. Monitoring and evaluation
7. Resources

- 1. Systematic Needs Assessment.** Every second year, SDV would carry out a Bankwide survey of demand for each VPU, using an agreed methodology that shows where demand lies based on polls of operational staff, a review of lending portfolio, emergent trends in lending, an analysis of task-team composition, a review of PADs (for investment loans and grants) and Project Documents (for DPLs) to assess the extent of SDV input to these products as well as compliance with policy. The goal of this assessment would be to determine the extent to which teams that require SDV input have access to that input.
- 2. Review of Staff Qualifications.** At least once every two years, the SDV Board would survey all staff mapped to SDV including ETCs and JPAs in order to assess their capacity for technical work in various areas including their undergraduate and post-graduate training, training and experience in the Bank and areas of interest for future knowledge acquisition. This analysis should also consider the availability and capacity of frequently used STCs.
- 3. Gap Analysis:** linking demand with supply. Steps one and two would be analyzed together to determine the existing capacity to fill the identified demand. Special attention would be given to emerging trends, such as the current demand for services relating to climate change.
- 4. Annual Staff Development Plans.** Based on the three steps outlined above, a subcommittee of the SDV Board would prepare an annual Plan for Staff Development, outlining -- on a region-by-region basis and Bankwide -- a plan for filling the gaps identified (see Box 4). Normally, this would be a multi-year plan with annual updates to keep it current.

#### **Box 4 – Adherence to Staff Development Plans**

At present, adherence to plans tends to be ad hoc for various reasons including budgetary constraints, overloaded work programs, unavailability of appropriate training and lack of follow-up by supervisors. For an integrated staff development plan to work, staff need to be actively counseled by their supervisors, normally the SDV Sector Manager for each region to assure adherence to the Plan and compliance by each staff member to their proposed Individual Development Plans. Currently each staff member formulates his/her own Development Plan for the OPE exercise indicating areas where each one intends to build skills. Staff and sector managers would be asked to justify non-fulfillment of Individual Development Plans.

5. **Feedback to recruitment and rotation policies.** The Staff Development Plan would provide a prescription for training, recruiting and rotating SDV staff as well as for cross-support to allow for sharing across VPUs. HR personnel would participate actively in this process. Rotation of staff among regions requires a second look by HR and line managers (see Box 4).
6. **Monitoring and evaluation.** The SDV Board would commission an independent evaluation of the fulfillment of the Staff Development Plan towards the end of each assessment cycle. There is also a need for more rigorous evaluation of training taken. Currently, evaluation for most training is done by questionnaires filled out at the end of a training course (often hastily) before the trainee or the supervisor has the opportunity to evaluate how useful the training has been in his/her work program. Evaluations should be based on three judgments, that of the trainee, that of the trainer and that of the supervisor based on actual job performance.
7. **Resources.** Clearly, the program outlined above would add significantly to the work load of SDV staff and to supervisor investment in each staff member.

**Box 5 --On Staff Rotation.**

Rotation of staff among regions and functions is one form of staff development. Rotation exposes staff to a wider range of situations and provides a mechanism for the dissemination of good practice across regions and sectors. As discussed above, the Bank tends to undervalue local knowledge while, at the same time, it needs such knowledge in order to prepare loan projects and carry out sector work that will be appropriate to the specific local needs of a country and its people. There is a prevailing attitude that such knowledge can be acquired by using local consultants and translators, but often this is not the case, especially in situations where there is a complex multi-ethnic socially stratified society. Staff rotation, following the so-called “3-5-7 rule” has been practiced more rigorously in recent years. *The SDV board may wish to propose that some SDV staff be partially exempted from this rule in order to get maximum benefit from SDV staff familiarity with local languages and social behavior.*

**Accreditation: a Tentative Design**

The terms of reference call for a proposal of an accreditation scheme for SDV specialists. It may be premature to make a specific proposal since the Bank Group has not yet officially opted for accreditation of staff in specific specializations. Accreditation could help to raise the capacity of staff to analyze and manage social issues in Bank operations and help to ensure greater consistency in the application of Bank policies across regions and sectors. There are also some downside risks as outlined in Annex E, one of which is a widespread staff antipathy to the notion of accreditation.

In any case, we will present here an outline of an accreditation system for SDV. As can easily be seen from a glance at Annexes A and B, social development covers a wide range of issues and the skills

needed for analysis and operational decisions in one area may not be adaptable to another area.<sup>8</sup> To achieve true expert status in any one area may take years of experience and knowledge of the topic. Consider, for example, the outpouring of literature on gender issues in the social sciences over the past 20 years. Even within this apparently well defined area of concern, there are many angles of approach and regional treatments of the topic that range from studies of gender discrimination in employment in industrial economies to issues of household decision making in, say, North Africa.

We propose, first of all, the formation of an Accreditation Committee of SDV experts selected from the SDV Board and senior SDV staff as well as one or two non SDV staff as a safeguard against bias.. This committee would, in the first instance, set the specific criteria for accreditation of SDV staff and, at a second moment, act as an accreditation board.

An accreditation system could be structured in two levels.

**Level I** –Accreditation would indicate familiarity with a broad range of SDV issues and work in the World Bank (as illustrated in the present report). Accredited SDV staff will be able to identify relevant social issues in all the core areas (See Annex B) and will be able to advise task teams about where to find resource materials and obtain sound advice on each of these core areas. Accredited staff will also be able to guide the preparation of TORs for social development consultants providing support to task teams. SDV staff accredited at level one will normally possess an advanced degree (MA or PhD) in a social science discipline (anthropology, economics, political science, sociology, social psychology, geography). They will be familiar with basic principles of measurement in the social sciences including sampling, surveys, qualitative analysis and the integration of disciplines.

Accredited staff will demonstrate basic familiarity with all the core areas of Social Development listed in Annex B. This familiarity can be achieved through having taken an entry-level course available in each of the particular areas and the one-week orientation described in Annex B, or providing other evidence satisfactory to the committee. While no staff member can achieve expert status in every subarea of SDV, it may be possible to provide a one-week basic orientation course for SDV staff that will familiarize them with a wide range of SDV issues in the Bank (Annex B). This course would serve the needs of three kinds of staff members: (a) staff who have recently joined the Bank; (b) staff who have specialized in one or two aspects of SDV work but who lack orientation in others, and(c) staff trained in other areas who are joining the SDV staff. Accredited staff should also fulfill the requirements for specialization shown in Annex B for at least **one** core area. Additionally, Accredited SDV staff will have been exposed to basic Bank processes (outlined in Annex B) by taking the relevant basic course.

**Level II** Some senior SDV staff will be designated as experts to be consulted by task teams, management and other SDV staff in particular areas of specialization such as gender, youth and violence, urban design, community driven development, Involuntary Resettlement, Indigenous Peoples and others. We will leave it to the Sector Board to decide whether specialists will be formally accredited or informally recognized.

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<sup>8</sup> SDV has recognized this in the preparation of sector guidance notes on Social Analysis in the urban sector, in transport projects, and regarding gender and youth.

Specialists would be able to provide detailed advice to task teams and to their counterparts on social sustainability and the development of programs and policy recommendations in specific country contexts and on the implementation of Bank safeguard policies. Specialists will be Grade G or higher and have had extensive operational experience and have authored reports, sector work, BTORs, sector work, and other major Bank documents. They should be capable and available to train staff and clients in the application of all of their specialty areas.

**“Grandfathering”** It is assumed that some SDV staff have already effectively achieved the prerequisites stated above for accreditation. Once the criteria have been established and are recognized, individual staff members would be invited to present themselves for accreditation on their experience and training. The Accreditation Committee would exercise judgment regarding de-facto accreditation. It is also desirable that some senior SDV staff will seek additional training or mentoring. For example, a staff member who is a recognized expert on the Social Safeguards may wish to acquire additional skills in policy analysis and macro-economics. With supervisors’ agreement, such staff could be encouraged to pursue training in the Bank and, as appropriate, outside the Bank as well.

**Timetable for Implementation**

The following is a tentative timetable for the implementation of the proposed training program. It is necessarily tentative in form because there are many unknowns including the availability of funding, decisions by management, the availability of instructors to plan and offer courses, the availability of staff to take course.

**Targets -**

Table 3 presents a quantitative goal for staff attainment of as defined above at the end of Fiscal Years 2012, 2013 and 2014. As indicated, attainment of these levels is contingent on a host of factors. If, however, this goal can be achieved, the Bank would have an accredited SDV specialist staff numbering more than 100, including 35 specialists. The project assumes that training can commence during FY 2011 and will continue into the following three FYs. A budget is presented in Annex I. The table assumes that some staff will achieve accreditation by grandfathering (see above) and presents the amount of training that will be necessary to achieve these goals. It assumes that some staff will have been. Since most of the basic courses such as “Basic Procurement” and the QACU course on Resettlement are offered several times a year for staff in general, this training is not considered as part of the incremental effort (and cost) of training staff to meet the accreditation goals shown in Table I.

**Table 3 – Proposed Training Goals**

		SDV Staff Accredited at Levels I and II			
		Yearly Increment		Cumulative Total	
Year↓	Level→	I	Specialist	I	Specialist
Year 0 (FY2011)		10	5	10	5
Year I (FY 2012)		20	10	30	15
Year II (FY2013)		20	10	60	25
Year III (FY2014)		30	15	90	40

**Budget**

Estimated Cost data are presented in Annex I. The total cost for training over four years (including FY 2011) is US\$253,600) plus an addition \$360,000 estimated for mentoring and associated travel, yielding a total estimated cost of \$613,000.