

# UNION OF EDUCATION NORWAY

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## Evaluation Report



of the Cooperation on Trade Unions  
between Education International (EI), Union of Education  
Norway (UEN) & Federation of Mongolian Education and  
Science Unions (FMESU)

BY NORA INGDAL AND BATJARGAL BATKHUYAG

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While we have made every effort to validate information, there may still be inconsistencies. We accept responsibility for all errors and inaccuracies.

18<sup>th</sup> March 2009, Ulaanbaatar/Oslo

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## LIST OF ACRONYMS AND ABBREVIATIONS

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CMTU	Confederation of Mongolian Trade Unions
CTF	Canadian Teachers' Federation
EDCM	Education Donors' Consultative Mechanism
EI	Education International
EIAP	Education International, Asia Pacific region
ESL	English as a Second Language
FFMESWTU	Free Federation of Mongolian Education and Scientific Workers Trade Union ( <i>old name</i> )
FMESU	Federation of Mongolian Education and Science Unions
GoM	Government of Mongolia
ILO	International Labour Organisation
JTU	Japan Teachers' Union
MDG	Millennium Development Goals
MEFTU	Mongolian Enlightenment Federation of Trade Union ( <i>old name</i> )
METT	Mongolian English Teachers' Training Program
MNT	Mongolian Tugrugs ( <i>national currency</i> )
MECS	Ministry of Education, Culture, and Science
MPRP	Mongolian People's Revolutionary Party
MTU	Mongolian Trade Union ( <i>old name</i> )
NOK	Norwegian Kroner (1USD = approx 7 NOK)
Norad	Norwegian Agency for Development Cooperation
SAARC	South Asian Association for Regional Cooperation
ToR	Terms of Reference
UNDP	United Nations Development Programme
UNESCO	United Nations Education Science Culture Organisation
UEN	Union of Education Norway
UNICEF	United Nations Children's Fund
USD	United States Dollar

# Table of contents

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<b>1</b>	<b>EXECUTIVE SUMMARY WITH RECOMMENDATIONS.....</b>	<b>5</b>
1.1	INTRODUCTION.....	5
1.2	MAIN FINDINGS.....	6
1.3	MAIN RECOMMENDATIONS.....	8
<b>2</b>	<b>BACKGROUND .....</b>	<b>11</b>
2.1	SCOPE OF THE EVALUATION .....	11
2.2	METHODOLOGY AND APPROACH .....	11
2.3	EVALUATION WORKING PRINCIPLES.....	13
2.4	LIMITATIONS .....	13
2.5	GUIDE TO THE READER .....	14
<b>3</b>	<b>PROJECT CONTEXT .....</b>	<b>15</b>
3.1	EDUCATION IN MONGOLIA .....	15
3.2	CMTU .....	16
3.3	FMESU .....	18
3.4	UNION OF EDUCATION .....	19
3.5	EDUCATION INTERNATIONAL .....	21
<b>4</b>	<b>PROJECT OVERVIEW .....</b>	<b>22</b>
4.1	HISTORY OF COOPERATION .....	22
4.2	GOALS, RESULTS, BUDGET .....	23
<b>5</b>	<b>RESULTS.....</b>	<b>24</b>
5.1	MEMBERSHIP – TRADE UNION TRAININGS .....	24
5.2	TRADE UNION TRAININGS .....	25
5.3	EDUCATION POLICY .....	26
5.4	OUTREACH .....	27
<b>6</b>	<b>PARTNERSHIP COOPERATION.....</b>	<b>29</b>
6.1	PROJECT MANAGEMENT.....	29
6.2	FINANCIAL MANAGEMENT .....	31
6.3	COMMUNICATION.....	33
<b>7</b>	<b>OVERALL ASSESSMENT.....</b>	<b>35</b>
7.1	RELEVANCE .....	35
7.2	EFFECTIVENESS AND EFFICIENCY.....	36
7.3	SUSTAINABILITY.....	37
7.4	VALUE-ADDED OF UEN – FUTURE ROLE .....	37
	<b>REFERENCES .....</b>	<b>39</b>
	<b>ANNEX 1 – TERMS OF REFERENCE .....</b>	<b>40</b>
	<b>ANNEX II – LIST OF PERSONS CONSULTED .....</b>	<b>45</b>

# **1 EXECUTIVE SUMMARY WITH RECOMMENDATIONS**

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## **1.1 Introduction**

This report presents the outcome of an external evaluation of the joint project between Education International (EI), Union of Education Norway (UEN), and Federation of Mongolian Education, and Science Unions (FMESU) financed by the Norwegian agency for development cooperation (Norad).

The main purpose of this evaluation of the project period 2003-8 was to determine if the goals had been met and to which extent the programme has had an impact on the overall professionalism of FMESU. The evaluation was asked to provide a basis for future decision-making with regards to the sustainability of the current project and the capacity of FMESU for implementing further programs.

The scope of the evaluation was to assess:

- Goals and objectives of the union in keeping with UEN/CTF/EI and the relationship with Mongolia's Ministry of Education, Culture, and Science (MECS).
- Review the extent to which the project goals are integral to FMESU priorities.
- Roles of FMESU Project Coordinator and FMESU leadership in implementing the project.
- Has the program enhanced the status of FMESU as an organisation perceived as being supportive of improving quality of education for children through the trade union training of its elected representatives and members?
- Recommendations to strengthen this program as it continues or for consideration in the development of other professional development programs for FMESU members?
- Lessons learned that may be useful in this or future cooperation between UEN and FMESU.
- Determine the level of sustainability of the project, credibility of the program from the perspective of stakeholders other than the teacher participants and FMESU and the impact this has on the status of the teacher organisation.
- Determine the level of sustainability of the project in the current or other form
- Expected role of UEN in the future.

An external team linked to Nordic Consulting Group (NCG) was commissioned to conduct the evaluation. Both team leader (Nora Ingdal) and team member (Batjargal Batkhuyag) were approved by UEN/EI and FMESU. In coordination with UEN/EI the Canadian Teachers' Federation (CTF) also commissioned an evaluation of its project, the Mongolian English Teachers' Training (METT) at the same time. Thus, the cooperating partners wrote joint Terms of Reference (TOR) for the evaluation. Due to the differences in the projects (trade union work vs. METT), it was decided to issue two different evaluation reports. The external consultants, including the Canadian evaluator Mrs Gerda Notacker, cooperated and exchanged information

and knowledge where this was relevant.

The main sources of information for this evaluation were qualitative; desk studies of existing project documentation and secondary sources of the education sector, including teachers' training programmes, in-depth interviews with key stakeholders and focus group discussions with teachers and trade union members. Some of the interviews were conducted jointly by the Canadian and Norwegian teams and some separately. A presentation of preliminary findings was shared by the Canadian/Norwegian team with FMESU for validation and discussion before the team departed from Mongolia.

## **1.2 Main findings**

Mongolia has passed through a rapid transformation during the last twenty years from a state-controlled economy to embracing a Western market economy. In that process, the Mongolian trade unions lost thousands of members almost overnight when the unions were liberalised and membership in the state-controlled unions no longer was compulsory. The trade unions had to reorient their organisational mentality, culture and approach to attract new and regain old members. With the collapse of the Soviet Union, the Mongolian educationalists approached Education International (EI) for membership. EI assessed FMESU and approved it for full membership in 1996. The membership in EI opened the doors to opportunities of international cooperation with both Canadian and Norwegian teachers' unions.

During the last ten years UEN and EI has supported FMESU's efforts in strengthening and developing the democratic structures of the federation. The main goals of the current project period have been to increase FMESU's membership; develop a union education policy; influence Mongolian educational policies; update and improve the trade union knowledge of the teachers and members of the union; and improve the salary and working conditions of the members.

Total budget of the project since 1998 has been around 1.5 million NOK (ca. 200,000 USD) distributed on project coordinator salary, recruitment-related and training activities in FMESU and travel costs for UEN/EI staff and representatives. Norad has contributed with the largest part of the funding and UEN has provided 10% of the funds. This evaluation focuses on the last two phases of the project from 2003-8.

Assessing FMESU's value seen from the members, the team found that FMESU is mainly perceived as protecting teachers' rights, and less known for influencing Mongolia's education policy. Although FMESU wants to play an important role in educational policies the trade union has so far not possessed sufficient capacity or organised in such a way that it would be able to produce knowledge and documentation that the government could use for developing/revising educational policies. One example is the issue of over-crowded classrooms - perhaps the largest frustration of teachers in the Ulaanbaatar time being. If FMESU had a research and analysis department or cooperated with research institutions/NGOs it could have surveyed all the schools and produced a report on number of schools suffering from this weakness in order to influence the government to make a plan of action for reducing the number of children per classrooms.

Discussing whether the project has enhanced the status of FMESU as an organisation perceived as being supportive of improving quality of education for children through the trade

union training of its elected representatives and members, the team did not find much documentation to support that. As seen above, FMESU's strength lies in protecting teachers legally and fighting for their working and salary rights, rather than addressing issues like access and quality of education.

The main goals were found to be highly relevant and integral to the teachers' union priorities. This is reflected by the fact that in the first phases of the project FMESU contributed with own funds and staff to the project. Another indicator of the project's relevance for FMESU is that the project was designed by FMESU's Executive Council and elected representatives in a joint workshop with UEN (in 2006). It was clearly in FMESU's own interest to offer trade union skills to its members.

Although the goals are integral to FMESU, the project has not been integrated financially and organisationally in FMESU. The project coordinator was until mid-2008 paid directly by EI in Malaysia and not over the FMESU project budget.

Looking at the main results, the team concludes that the fact that FMESU has allowed its international sister organisations (UEN/EI) to work on the union's democratic structures is an interesting achievement. Keeping in mind the historic legacy of FMESU it was not for granted that all unions would have allowed external actors to "interfere" in what can be perceived as "internal affairs" in the union.

UEN, and especially EI has adopted a long-term strategy of "engaging for change" with FMESU. The level of engagement has varied according to how receptive the leadership of the teachers' trade unions has been. Being a democratic union, the FMESU leadership has changed frequently in the last ten years through elections and due to internal conflicts. The rapid changes have affected the cooperation with UEN. On EI's side the leadership has remained unchanged in the same period and this has led to continuity in engaging FMESU to promote the changes.

Although FMESU has opened up to international cooperation, the same cannot be said about national cooperation. FMESU does not cooperate with Mongolian non-governmental organisations (NGOs), educational networks or with other private actors, but has focused the cooperation with the government. FMESU has an agreement with MECS which includes a wide range of issues from negotiating on teachers' salaries, upgrading of teachers skills and qualifications to providing quality input to MECS on how to obtain the MDG goals of education for all in Mongolia.

Assessing the value-added of UEN and EI, the team found that EI has had the main responsibility for following up the project. UEN's specific contribution has been related to one workshop conducted by two elected representatives from the branches in Norway on how FMESU can develop a policy on reducing dropout and increasing enrolment in the schools. Apart from this workshop, the contributions from UEN has been counseling through short visits to FMESU to discuss administrative and managerial issues related to internal conflicts in FMESU. By getting involved in the internal conflicts in FMESU, UEN's ability to focus on the project's overall results was weakened.

A main achievement related to the project and UEN's role is to promote gender equality in the FMESU leadership. According to FMESU statistics, before the Conference in 2004, there was 27% female representation, after the Conference the percentage had increased to 55%. This is

an important achievement in the largely male-dominated trade unions. The FMESU Executive Council now has a majority of females, something which reflects the members of FMESU.

Delays in the UEN funding to FMESU seriously impeded the effectiveness of the project. Funds were at the earliest available in June each year and due to summer holidays and then school starts, the project activities were only implemented in the last three months of the year (October-December). In 2007, FMESU narrative and financial reporting was inadequate and coupled with the internal conflicts in FMESU this led to decreased funding for 2008.

The financial reporting is based on detailed level of accounting using excel sheets, and not integrated in the regular financial management system of FMESU. However according to the volunteer accountant, the project accounts are better organised than the regular accounts of FMESU. There are no consolidated project accounts only separate accounts by source of funding (UEN, CTF, ILO, JTU, etc). FMESU is currently implementing 5-6 projects with support from four funding partners. There is no standardized project management system within FMESU.

### **1.3 Main recommendations**

The current project funding came to an end in 2008. UEN continued to pay for the project coordinator salary for 2009 to support follow-up of this evaluation. There is a clear need for UEN/EI and FMESU to sit down and discuss the way forward.

The team recommends UEN, EI and FMESU to give their written inputs to this report as a first step in that process, and preferably meet to discuss the findings and recommendations.

#### **Recommendations for FMESU**

1. Irrespectively of whether a new project will be jointly developed, the team recommends FMESU to capitalise of the results that have come out of this project (strong gender balance, slight increase in members and training materials developed) by strengthening the program further: integrate the project with the regular organisation to strengthen the ownership of FMESU to the project. Cooperation projects such as these needs to be owned by the whole organisation and not a few individuals.

2. The team found an absence of real educational policies in FMESU and thus recommends strengthening the research/analysis capacity in the federation and/or seeking cooperation with universities, research institutes and NGOs who have the know-how of producing research and policies. FMESU should develop policies according to teachers' needs on issues such as for example working conditions ("crowded classrooms", "political appointments of principals" or other urgent issues). FMESU should look into the option of recruiting staff with such competencies.

3. Sharing of information internally in the federation is crucial. The team recommends FMESU to work on improving both the internal and external information-sharing and communication. FMESU staff and representatives need to be made aware that sharing of information is not a threat and will not undermine their positions. Rather, everybody will benefit if information is shared for the purpose of making the federation more efficient and credible in the eyes of the members. For external communication FMESU needs to develop a website where information about all of FMESU is placed, including international partners so that the current partners are



familiar with each other's work.

4. Part of improving the communication is linked to the need for asserting clear lines of command in FMESU and division of roles and responsibilities. The team recommends FMESU to draw up the organisational structure whereby project staff is integrated with regular FMESU staff and make the structure known to the staff.

5. FMESU need to pay special attention to the risk of returning to centralised decision-making structure. Since the FMESU president is also as the president of CMTU and the constitution has been revised towards centralised powers in the hands of the president, mechanisms need to ensure that responsibilities are delegated to general secretary, project committee etc if the president is unable to attend to all duties.

6. FMESU is also encouraged to promote transparency by conducting external financial audit of the whole federation including all incomes and expenditures related to international partners and how the membership fees are utilised. Such institutional financial audit reports should be public and shared with the members of the federation. It will also increase the transparency towards the international partners.

7. Related to the project management, the team recommends revising the regulations for the Project Committee with particular focus on:

- Composition: clearly state criteria for membership in committee and include professionals who have project experience.
- Make it clear who calls for the meetings.
- Minutes to be signed (use template) that makes it clear which decisions have been agreed on in the meetings.
- Frequency of meetings: the draft regulations states at least once annually, but this is not sufficient if the project committee should provide backstopping for the project coordinator

7. For financial management of the project, the team found a few irregularities as described in this report. However, FMESU has an excellent external auditor and the irregularities have been highlighted in the audit report. The team recommends retaining an external auditor of this quality for any potential future project cooperation.

8. For FMESU as a whole there is a need to develop overall financial regulations for the federation, especially if projects are to be integrated with the organisation.

### **Recommendations for UEN/EI**

Assessing the future role of UEN in this cooperation, all depends on whether there is a will to continue the cooperation from both sides. From UEN's side, the organisation is in a process where it needs to concentrate its international solidarity work in fewer countries due to lack of capacity and funding restraints from the donor Norad.

1. For the short-term, the team supports UEN's commitment to continue funding the project coordinator salary for 2009 in order to implement a selection of the recommendations from the evaluation. However if plans are to be made for 2010, FMESU need to show its

commitments to the above recommendations if UEN/EI should re-engage financially.

2. For EI's role, the team strongly recommends EI to continue its moral support – and capacity-building work of FMESU, including FMESU in regional seminars on teachers' issues, irrespective of whether new funding from Norad is sought for a new period.

If UEN decides to continue in a new project cooperation period, UEN/EI should consider:

3. Clarify to FMESU what it can 'offer' in terms of technical assistance within fields of educational policies and trade union work, counselling, training and capacity-building, including project and financial management by writing job descriptions and TORs or the trainings for FMESU. Such assistance must be a part of a FMESU-owned process where UEN/EI's contributions will feed into an ongoing process.
4. Focus more on the long-term project results and outcomes, develop outcome indicators, engage more systematically, and spend at least one week during visits to the partner in Mongolia if cooperation is to be continued.
5. Support and communicate with FMESU as an institution, not with individuals
  - Do not pay salary to project coordinator outside framework of project cooperation
  - Make trade union principles clear, but respect democratic processes in FMESU with regards to for example elections.
6. Expand job description of Project Coordinator to include CTF-related work as she is in reality today working on the METT program with the ESL coordinator.
7. Offer study tours to FMESU staff and representatives to Norway in order learn how UEN serves its teachers members.

## 2 BACKGROUND

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This report presents the outcome of an external evaluation of a joint project between Education International (EI), Union of Education Norway (UEN), Federation of Mongolian Education, and Science Unions (FMESU) financed by the Norwegian agency for development cooperation (Norad).

Nordic Consulting Group (NCG) was commissioned to conduct the evaluation. An external team consisting of Nora Ingdal (team leader) and Batjargal Batkhuyag (team member) were approved by both UEN and FMESU. In coordination with UEN and EI the Canadian Teachers' Federation (CTF) had commissioned an evaluation of its project, the Mongolian English Teachers' Training (METT) parallel to this evaluation. Thus the team cooperated and exchanged information and knowledge with Mrs Gerda Notacker, the external evaluator commissioned by CTF.

### 2.1 Scope of the evaluation

The main purpose of the evaluation was to determine if the goals of the project have been met and to what extent the program has impacted on the overall professionalism of FMESU. The second purpose of the evaluation was to provide a basis for UEN/EI on future decision-making with regards to the sustainability of the current project and FMESU's capacity for implementing further programs.

The TOR highlighted the following questions for the evaluation (see TOR in Annex I):

- Goals and objectives of the union in keeping with UEN/CTF/EI and the relationship with Mongolia's Ministry of Education, Culture, and Science.
- Review the extent to which the project goals are integral to FMESU priorities.
- Has the program enhanced the status of FMESU as an organisation perceived as being supportive of improving quality of education for children through the trade union training of its elected representatives and members?
- Lessons learned that may be useful in this or future cooperation program between UEN and FMESU.
- Expected role of UEN in the future.
- Determine the level of sustainability of the project, credibility of the program from the perspective of stakeholders other than the teacher participants and FMESU and the impact this has on the status of the teacher organisation.

### 2.2 Methodology and approach

The evaluation has been divided into four phases; a preparatory phase, field survey in

Mongolia from 19-28<sup>th</sup> January 2009, analysis/reporting and presentation of the findings.

The main sources of information have been qualitative; desk studies of existing project documentation and secondary sources of the education sector, including teachers' training programmes in Mongolia, in addition to a brief review of Mongolia's political transition to democracy in order to place the project in its proper political, economic and social/cultural context.

Some of the fieldwork interviews and focus groups were conducted jointly by the Canadian and Norwegian team, and some were held separately; the Canadian evaluation focused on the results of the METT program and this evaluation concentrated on the activities for promoting trade union issues. During the fieldwork a large number of people and institutions were consulted:

- Joint introductory workshop for 65 FMESU elected representatives and staff where the purpose was to share information with FMESU on the planned methodology of the two evaluations (CTF and UEN), get feedback and inputs from FMESU representatives and staff on methodology and key issues pertaining to the evaluation.
- Inputs from 65 members of Executive Council on achievements of Canadian METT programme and UEN/EI trade union project.
- Semi-structured interviews with eight FMESU representatives and staff, including president (of CMTU), general secretary, project committee members and members of the Executive Council.
- Education and Science Department of the City of Ulaanbaatar
- Ministry of Education, Culture, and Science, department of Primary and Secondary Education
- UN agencies; UNDP, UNICEF
- Two kindergartens and one school were visited
- One focus groups with teachers and one with female teachers' bursaries
- External auditor (ONCH-AUDIT) and the volunteer finance staff of FMESU

In addition to the above, interviews were conducted with the head and advisers of international department of UEN in Norway and elected representatives of UEN that had taken part in the trainings of FMESU in Mongolia. A phone interview was held with the head of EI Asia and Pacific office (EIAP) followed by a brief email interview to follow-up issues.

Quantitative analysis was utilised for the statistics pertaining to participants in trainings and seminars of FMESU.

The timeline of the evaluation was jointly agreed upon by UEN/EI/CTF:

- October 2008 - Initial Planning in Ottawa, Oslo and Ulaanbaatar: Distribution of questionnaires for METT
- 19-28 January 2009: Fieldwork – Ulaanbaatar and outskirts
- February – March 2009: Analysis of data & write-up
- Mid-March 2009: draft report(s) sent electronically to FMESU, CTF, EI and UEN
- Mid-April 2009: Response to draft report(s) to be received by evaluation team

- Spring 2009: Evaluation planning workshop FMESU/EI, UEN<sup>1</sup> (CTF not decided)
- June 2009: Final report delivered to CTF, UEN, FMESU, EI and Norad and CIDA

Although the Norwegian/Canadian/Mongolian evaluators cooperated and exchanged information during the fieldwork, there was an agreement to write two separate reports.

## 2.3 Evaluation working principles

The evaluation team has adhered to the following main principles when conducting the review;

- **Empowering:** the team has tried to empower those involved in the evaluation (as opposed to making stakeholders subjects to 'question-answer' style) by engaging them in open-minded discussions.
- **Designed to lead to action:** the evaluation has attempted to give advice and recommendations that are realistic, feasible, and doable, and thus lead to action so that the project will improve in the areas where there is room for improvement. This approach also includes solving issues that arise in the process of the evaluation.
- **Honest** and productively critical, but at the same time culturally sensitive is another principle that we have tried to adhere to by always carefully listening and taking notes of stakeholders input. By having one of the team members speaking Mongolian and an external interpreter, this facilitated the participation and dialogue between the team and project stakeholders.
- **Evidence-based** and in accordance with standards for ethical research. All findings are substantiated by documented findings using triangulation.
- **Participatory** (to the greatest extent possible). Participatory has meant that the evaluation team has shared findings with FMESU staff and representatives during the field survey in Mongolia, both in an introductory workshop the first day – and in a Debrief on the last time. The same Debrief presentation was shared with UEN's staff in the international department along with two elected representatives. The purpose of these debrief workshops was to verify findings and to avoid misunderstandings or misinterpretation of data.

## 2.4 Limitations

Among the limitations that apply to this evaluation language was an obstacle. The Norwegian consultant did not speak Mongolian and many of the stakeholders did not speak English. Although the team was greatly helped by an independent translator and the national team member elaborating on the Mongolian context, nuances of the understanding were probably 'lost in translation'. Most of the FMESU project documents were in Mongolian language, and

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<sup>1</sup> UEN decided not to organise the planned workshop in Spring 2009.

the Mongolian team member was loaded with extra work of reviewing and translating key documents.

Vice versa, some of the UEN documents like travel reports were only accessible to the Norwegian team leader as they were written in Norwegian language. Both of these factors impeded on the complete understanding of all external and internal factors influencing the implementation of the project.

A final limitation was that the schools were on winter holidays during the first week of the evaluation fieldwork. This was a disadvantage in terms of lack of access to the children. On the other hand it meant that the teachers had more time and were available for the evaluation workshops, both the Introductory Workshop and the Debrief and presentation of preliminary findings. The second week the children were back in school and the team could observe the teachers' methodologies in practice.

## **2.5 Guide to the reader**

This report is divided into seven chapters; Executive Summary with Main findings and Recommendations, Chapter Two contains a background for the evaluation, purpose, scope, and methodology used. Chapter Three provides the educational and political context of the project and a brief presentation of the main actors in the project (UEN, EI, FMESU and CMTU). Overview of the project goals and results is briefly presented in Chapter Four. The results and findings are presented in Chapter Five and Six along the parameters of the Terms of Reference (TOR), and Chapter Seven gives an overall assessment of the results along the criteria of relevance, effectiveness, efficiency and sustainability, in addition to discussing the value-added of UEN and EI in the project cooperation. The report is followed by references and two annexes, TOR and list of people interviewed.

## 3 PROJECT CONTEXT

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### 3.1 Education in Mongolia

The education system in Mongolia consists of nursery school, kindergarten, twelve-year primary and secondary school, higher education institutions like universities and private colleges. After a decline in enrolment ratios during the transition<sup>2</sup> period from socialist rule to a market economy in the 1990, school attendance is today near-universal: primary school attendance rate is estimated at 97%, and adult literacy at 98%.<sup>3</sup>

Access to basic education does not have long traditions in Mongolia. Traditionally, education was reserved for Buddhist monks in the monasteries. Secular education was introduced less than hundred years ago. Tibetan was the language of instruction in the monasteries. After the collapse of Chinese authority in Mongolia 1911, the Russian influence of Mongolia started. The first Russian school was opened in the capital Ulaanbaatar in 1914 and its graduates went to cities in Russia for further education. The tradition of sending students to Soviet/Russia continued into the end of the 1990's. The traditional Mongol script, based on the Uighur script, was replaced by Cyrillic in 1941.

In the years following the 1991 transition from a centrally planned economy to a market economy, the country has faced many social, environmental, political and cultural challenges: extractive industries' racing for access to the country's rich minerals, loss of state-provided services in health and education, and climate-induced changes with extreme cold and snowstorms during winter disaster (*dzud*), droughts, forest and prairie fires, floods and outbreaks of human diseases.

However, despite the challenges, Mongolia has been able to hold nine elections and a relative peaceful transition to democracy. The only exception was last year's post-election violence following the Mongolian People's Revolutionary party (MPRP)'s declaration of winning the parliamentary elections, while the opposition party alleged fraud and vote-rigging. Five people were killed in the violence.<sup>4</sup>

The Government of Mongolia (GoM) has put great emphasis on the education system reaching out in all the 21 provinces (*aimags*) and the most remote *soums* (administrative units within the aimags) - with the assistance of civil society and international agencies. Despite progress in

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<sup>2</sup> The term 'transition' in Mongolia is used to refer to the change in direction when the Soviet Union collapsed in 1990 and Mongolia started its orientation towards the Western Capitalist system. Mongolia, during the Cold War, was unofficially considered the Soviet Union's sixteenth, poorest and most dependent satellite. After the collapse of Soviet communism and the break up of the Bloc, Mongolia, with little notice, launched sweeping economic and political reforms simultaneously. Mongolia went through a transition from Soviet style communism to a free-market economy and democratic political system.

<sup>3</sup> Government of Mongolia, Master plan for education sector 2006-2015, approved in 2005.

<sup>4</sup> The MPRP, which ruled Mongolia in the communist era, won 47 of the 76 seats in parliament while its main rival, the Democratic Party, took 26 seats. 2000 people were injured, 1000 detained and at least five people were killed. EIU (2008)

increasing the enrolment rates, there are still many challenges in the education sector: poor quality and relevance of the current curriculum for primary and secondary education; inadequate teaching qualifications and skills; lack of consistent education standards; weak learning and teaching environments in schools and supply-driven irrelevant vocational education for youth (UNICEF, annual report 2008).

In 2005, the GoM approved the Education Sector Master Plan.<sup>5</sup> The Master Plan is a roadmap towards achieving two strategic goals for in 2015: reducing poverty and social inequality by making Mongolia's education more accessible and inclusive, and improving the quality of education to reflect the needs and challenges of a contemporary society.<sup>6</sup> The Government decided to extend the school system to 12-year system in 2008 only 3 years after it was extended from a 10-year system to an 11-year system.

More specifically, the Plan aims at:

- Increase the preschool gross enrolment up to 99%
- Reduce disparities in unequal opportunities to obtain quality education among students and support to enjoying rights to study
- Provide continuous educational services in conformity with needs to study and live of people, and improve accessibility of non-formal and adult educational services.

There are approximately 30.000 pre-school, primary and secondary teachers in Mongolia. FMESU has 16.500 members, but this figure also includes non-teaching staff. The statistics are not broken down on teachers. However, one might assume that at least half of the 16.500 are teachers and thus it means that perhaps one third of the teachers in Mongolia are members of FMESU.

## 3.2 CMTU

The Confederation of Trade Unions in Mongolia was established in the Soviet-influenced era of Mongolia some 81 years ago (in 1927). Until 1990 CMU was closely affiliated with the ruling party Mongolian People's Revolutionary Party (MPRP)<sup>7</sup> and its employees were on the government payroll.

Membership in CMTU at that time was close to compulsory. In 1989 CMTU had 600,000 members, grouped into four categories of trade unions: industry and construction; agricultural workers; transportation, communications, trade, and services; and culture and enlightenment. Trade union organizations ran production and training conferences, and they participated in collective agreements between the managements of enterprises and trade union committees. They also articulated issues of concern to the work force, supervised social insurance programs, and oversaw the observance of labour legislation.

After the transition, CMTU lost two-thirds of its members totalling today 204.000 members. From being a well-positioned and financially strong organisation, CMTU had to change the way it worked in order to adapt to the new social and political reality, of actively providing services

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<sup>5</sup> Government of Mongolia, *Master plan for education sector 2006-2015*, approved in 2005.

<sup>6</sup> Mongolia is also striving towards reforming its higher education with particular focus on science and technology and in 2007 it approved the Science and Technology Master Plan for the period 2007-2020

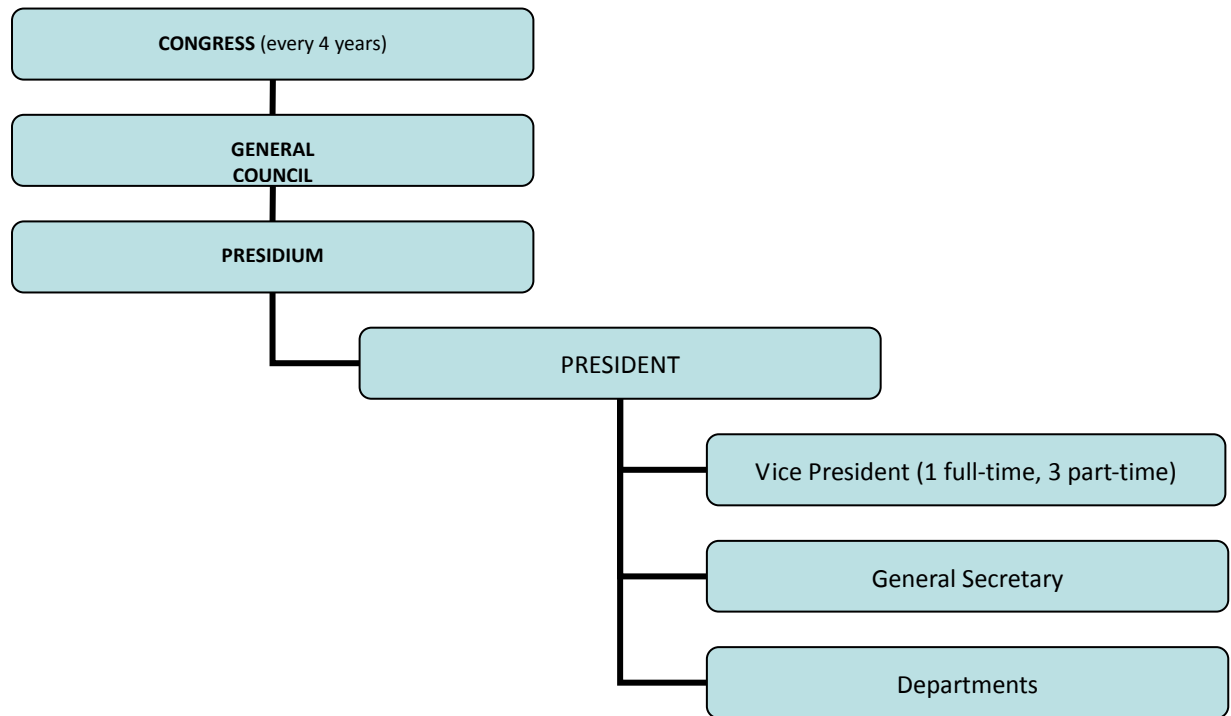
<sup>7</sup> The president of CMTU used to be a member of the Central Committee of MPRP.



to its members. CMTU has undergone gradual changes in membership, work methods and orientation to politics in the last 15 years.

CMTU, according to its statutes, aims to create conditions to protect a people’s right to work and legal interests in labour relations and create conditions for dynamic increase of living level by intensive development of trade union movement.

**Figure 1: Organizational structure of CMTU**



The mandatory organ of the CMTU is the General Congress that convenes every four years. The General Congress decides on the strategy and policy. Between the sessions of the General Congress the General Council that consists of president, vice president, general secretary, delegation of member organizations, and heads of committees, holds the highest power. The General Council implements the statutes, develops strategy, policy, and resolutions of the General Congress and reports to the General Congress. The Presidium of the General Council is the highest managing body of the CMTU between the meetings of the General Council. The Presidium meets at least once a month.

CMTU has 35 affiliated members; 13 federations and 22 provincial unions in the aimags. One of the clauses in the statutes of CMTU that is creating problems for the members is the clause that does not allow “double membership”. This implies that since CMTU is recruiting in the aimags, a worker who ideally would have liked to be a member of one of the profession-based trade unions according to his/her profession (ex teachers, doctors) would not be allowed to hold a membership in both CMTU and for example FMESU.

FMESU is by far the largest federation in CMTU. After FMESU there are three large unions, the Railway union (which is the only one that did not its loose members), the Mining union, and the Medical union of doctors and nurses.

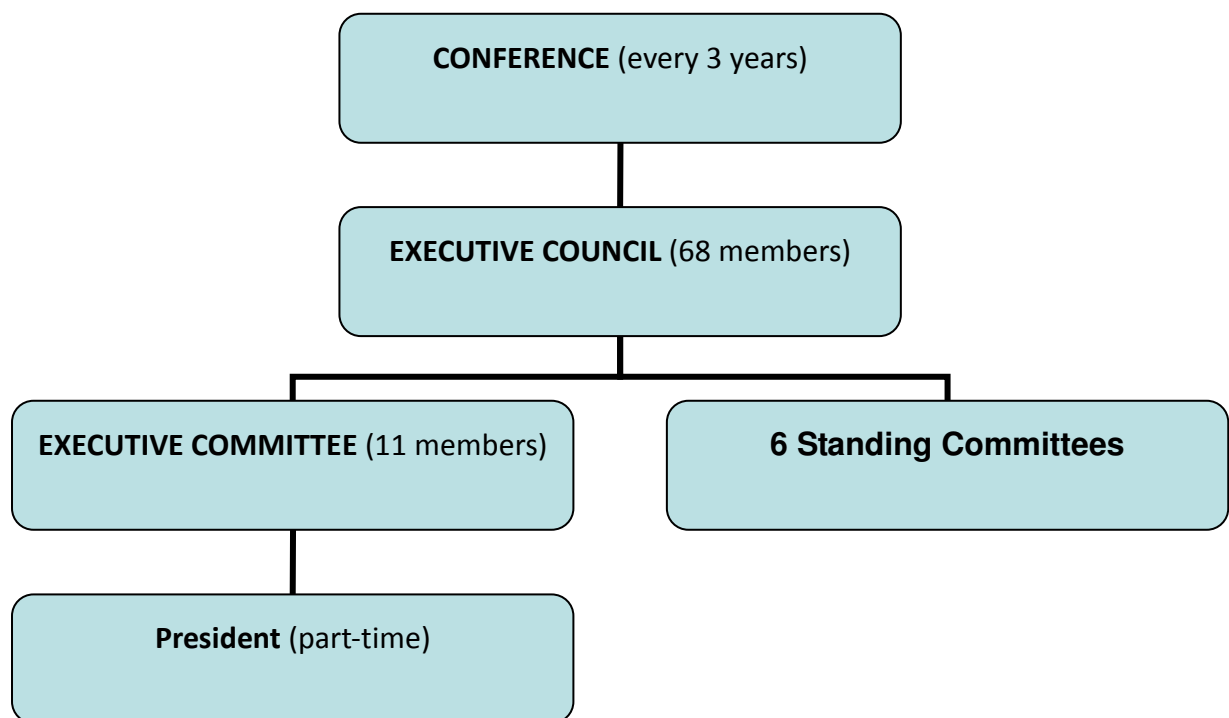
Current issues in focus for CMTU are how to reform the national insurance systems (workers rights) and mining issues. Mongolia is rich on minerals and this attracts many foreign

companies that are trying to get into the mining sector. CMTU is, according to its own statement, leading the civil society's efforts to get a new investment agreement on major projects and protecting workers from exploitation.

### 3.3 FMESU

The Federation of Mongolian Education and Science Unions is the most powerful among the other federations and unions in CMTU with its 16.500 members. FMESU has close links with CMTU. Its constitution states that FMESU's "offices should be located in the CMTU building" §1.7). However at the same time, the FMESU Constitution (2008) §1.4 states that FMESU "shall be free to ..... join or withdraw from the Confederation of Mongolian Trade Unions". For the last two years the president of FMESU has also been the president of CMTU, which is another indicator of the close relationship.

**Figure 2 FMESU organisational structures**



The above organisational structure of FMESU consists of the Conference which is the highest decision-making body and supreme authority. Until the Constitution was changed in 2000, the Conference used to convene every four years, but in 2004, this was changed to convene every two years. Last year this was however reversed back to three years.

The Conference elects the 68-member Executive Council which is considered the 'government of the union' (§5.1) and should conduct the business of the union between the conferences. The Council which is elected for three years at a time consists of the 11 Executive Committee members (see below), 7 Auditing Committee members, and 1 representative for every 300 members. In total 68 members.

The Executive Council elects the 11-member Executive Committee which is composed of the president, the general secretary, 1 member representing universities, 1 member representing vocational schools, 4 members representing primary, secondary and high schools and 2 members representing the pre-school/kindergarten sector.

The constitution states that at least 40% of the Committee members should be women. Currently there is a large majority of women, in both the Executive Council and Committee. Out of the 68 members in the Council, there is 81% female representation.

The president is now also elected for three-years. After the current FMESU president was elected president of CMTU, the constitution was changed in May 2008 to include that the president should be a part-time position (§4.13).

According to the Constitution, FMESU should have the following standing committees: human and TU rights, women's, children and youth, budget and finance, project, and education policy committee. If deemed necessary, the Executive Council can initiate the set-up of new standing committees.

For international partners, apart from the cooperation with EI, CTF and UEN, FMESU has enjoyed the cooperation with the Japan Teachers' Union on a Child Labour project. The goal of the project was to increase the awareness of child labour and children who are at risk of dropping out of the schools by sensitising teachers and school workers on the issue and to provide financial assistance to 50 children that have been selected by FMESU.<sup>8</sup>

FMESU has also cooperated with the International Labour Organisation (ILO) on the project IPEC (International Program for Elimination of Child Labour) working against child labour. FMESU has submitted proposals every year, mostly approved, with components to organize seminar trainings, and develop and distribute manuals for teachers and training material all over the country. In 2008 FMESU organized a big campaign jointly with ILO "Education is the most effective tool to combat poverty".

FMESU has changed names many times, at the start of the cooperation with UEN it was called Free Federation of Mongolian Education and Scientific Workers Trade Union (FFMESWTU), later it changed to Mongolian Teachers Union (MTU) and Mongolian Enlightenment Federation of Trade unions (MEFTU) until it became FMESU in 2006.

### **3.4 Union of Education**

Union of Education Norway (UEN) was founded on 1 January 2002, and a result of a merger of two teachers' unions, the Norwegian Union of Teachers and the Teachers' Union Norway. With its approximately 145,000 members it is the biggest trade union for teaching personnel in Norway, and the second largest trade union on a national level.<sup>9</sup>

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<sup>8</sup> JTU/FMESU/EI Child Labour Project Report, PY-2006

<sup>9</sup> Most of this section is borrowed from NCG (2008), *Organisational Performance Review of UEN*, commissioned by Norad. Team leader Jens Claussen with Nora Ingdal and Marit Vedeld.

UEN has members working in all areas of the education system, ranging from pre-, primary and secondary school level to colleges, universities and adult education. It also has also members from special educational and administrative support functions. As a trade union its primary mission is to promote the interests of its members, both in respect of issues relating to working conditions and in respect of education policy.

UEN's organisation consist of four levels (Central, Provincial, Municipal and Work-place level) with one secretariat the central level and 19 provincial secretariats serving the organisation. At the central level of the organisation is the National Congress which is the highest decision making body of the organisation. It is convened every three years and decides on overall policy and strategic issues for the organisation. The UEN Council of Representatives meets twice annually and decides on annual budget and accounts as well as other management related issues based on inputs from the Executive Committee.

The Executive Committee is the highest authority at an operational level and gives directions and makes decisions guiding the Secretariat and implements decisions by the National Congress related to policy and strategic issues. In addition, the organisation has 9 thematic units/advisory boards serving an advisory role for the various decision making levels of UEN but are also occasionally delegated decision making responsibilities.

In terms of UEN's "solidarity work" (development cooperation), the technical professionals are mainly recruited among the elected representatives of the Central and Provincial levels as well as from the Secretariat itself which in total constitute a resource base of more than 2,800 members/employees of the organisation. The portfolio of projects is managed by the International Department within the Secretariat. Of the above resource base some 34 persons have participated in implementation of projects with partner organisations in developing countries during 2006 - 2007.

UEN is a member of the worldwide teachers' federation, Education International (EI). Through EI, UEN is involved in work relating to education, human rights and trade union rights. A major share of UEN's contribution to international solidarity work is made jointly with or through EI (as supplier of finance and technical assistance).

UEN's international work is organised as an integrated part of the organisation using regular organisational units to provide services coordinated by its international department. UEN supports a significant portfolio of projects through its international solidarity work for which it receives funding from the Norwegian aid budget. The specific purposes for the international solidarity work is stated by UEN to be;

- Work for increased focus on quality education for all, labour rights, and women's participation.
- Help to focus attention on education, and trade unionism in Norwegian development policy through Norad.

The main approach chosen in UEN's solidarity work is through cooperation with partner teachers' unions in Asia, Latin America, Europe and Africa. 16 national partner unions have been funded through a bilateral arrangement while 10 have been regional or global "projects". Of the total portfolio, Global, Regional Africa as well as Palestinian Territories, Indonesia and Zambia account for more than 50% of total aid receipts. Mongolia ranks in the lower end of the

table of recipient partner unions.

### **3.5 Education International**

EI represents nearly 30 million teachers and other education workers, through 401 member organisations in 172 countries and territories.<sup>10</sup>

EI's income is based on membership fees from its more than 400 teachers' trade union members around the world adjusted to the members' size and economy. Since 1995, EI has had a deliberate policy of fundraising among the richer members for international solidarity projects.<sup>11</sup> UEN is among the most important funders of EI.

EI's strategic goals for the period is to contribute to the accomplishment of basic education for all by 2015, as specified in the Declaration of the Dakar Education for All Forum in April 2000, and the mobilisation of the necessary increased resources for education, by allocating at least 6% of the Gross National Product to national education budgets, by writing off the debt of low income countries, increasing national efforts and Official Development Assistance from OECD countries for basic education, and by allocating credits through the World and Regional Development Banks

EI has regional offices in Latin America, Africa and Asia/Pacific. The Asia-Pacific region is EI's largest in geographical terms whereby EI has 72 affiliates in 35 countries and territories.

The issues that EI are dealing with in this region is as diverse as the region itself in cultural, social and economic contexts; ranging from problems of child illiteracy/child labour, gender equity and HIV/AIDS, to issues arising from the liberalisation of the national economies and education for all. Cross-cutting for all affiliates are key themes like better organise on union issues including leadership and promote human and trade union rights.

EIAP's work with FMESU in Mongolia contains a number of activities. In the last three years, EI organised the following activities with FMESU

- a. Pay Equity Seminar – 2008
- b. Education for All – reducing dropouts in schools in 2006
- c. Education Policy Development in 2005

In addition to the above, EI has in cooperation with UEN organised one regional financial management seminar for all accountants/financial officers in the trade union partner organisations. FMESU did not send its financial staff, but sent its external auditor to attend this training.

There is regular planning and evaluation meetings. EI visits FMESU at least once a year. If UEN or CTF are visiting, EI tries to accompany them on these visits. The first day of the planning meeting in the visit is devoted to "needs assessment and situation analysis". There has been no specific EI assessment of the FMESU so far.

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<sup>10</sup> In many countries there is more than one teachers' union that has been recognised by EI as member organisations, and thus there are more members than the number of countries and territories.

<sup>11</sup> In Education International's First World Congress meeting in Harare (Zimbabwe) from 19 to 23 July 1995, EI decided to start fund-raising in order to have its own development cooperation projects.

## 4 PROJECT OVERVIEW

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### 4.1 History of cooperation

Until the fall of communism, FMESU which at that time was called Free Federation of Mongolian Education and Scientific Workers Trade Union (FFMESWTU) was a member of the Federation of international socialist educationalists (FISE). With the collapse of Soviet Union, FISE was dissolved and FMESU approached EI for membership.

Two members came from EI to study the FFMESWTU constitution, and conducted interviews with elected representatives and staff. After a long process it was decided that the Mongolian teachers union could be approved and included. The first delegation from the Norwegian Union of Teachers' (Lærerlaget) came to visit in 1998 along with the head of EIAP. Since then there has been a continuous cooperation with FMESU with various degrees of interaction and funding.

According to both EI and FMESU, there was no feasibility study or needs assessment before starting up the project cooperation. EIAP asked in what area the MTU needed assistance. EI explained that they cooperate with all development agencies around the world. The main goal of the cooperation was decided to be "strengthen and develop democratic structures" of the teachers unions. FFMESWTU was at that time a male-dominated and highly centralised organisation with a vague and loose constitution.

Due to challenges in communication, the current project coordinator who at that time was an English teacher in a countryside school was brought in as a translator for the first seminar. In 1998, the project hired her as a project coordinator. She has been project coordinator for all the subsequent years until May 2008.

The project cooperation between EI/UEN and FMESU has gone through three phases.

- First Phase 1998 – 2003: initiated jointly by EI/UEN, cooperation was frozen for almost a year in 2003 when the union did not convene its regular Congress.
- Second Phase 2003-5 was initiated after the Congress elected a new leadership with more than 50% women participation.
- Third Phase 2006-8 – constitution changed several times, internal conflicts.

When EI with the support of UEN decided to employ a project coordinator, the project was approved with a budget for 5 years and they decided on the following criteria for employment of the coordinator:

- Fluent written and spoken English language
- Woman (due to male-dominance in union)
- Be a member of FMESU

In the first phase (1998-2003) EI had the main responsibility for following up the project while UEN kept a distance. The reasons seemed to be that EI had knowledge about the Mongolian context and background. EI used to visit twice a year as it participated in the Evaluation and Planning meeting in December and Seminars in January. EI assisted in the management of the

project.

According to the former project coordinator there was also a certain degree of resistance from the traditional leadership in MEFTU/FMESU against UEN's "intervention". Thus UEN felt it would be more acceptable to FMESU to leave the main monitoring, follow-up and supervision of the project cooperation to EI.<sup>12</sup>

In the third phase starting with UEN submitting a proposal to Norad in end of 2005, UEN decided to take on a more active role. According to the annual report summing up the years 2003-5, "The [union] has reached many of its goals with regards to democratisation and sustainability. The development challenge is to recruit members outside the capital Ulaanbaatar, because there are no longer restrictions on that in CMTU. Even when there were restrictions on FMESU's recruitment, MEFTU managed to recruit 500 new members annually."<sup>13</sup> As will be discussed in this report, the above does not accurately describe the situation in FMESU as restrictions on recruiting members in CMTU controlled areas are still valid.

## 4.2 Goals, results, budget

As stated in the application that UEN submitted to Norad for the third phase of the project 2005-8, the project had the following goals:

1. Recruit more members in FMESU
  - 8000 more members in 12 provinces by the end of 2008
  - Recruit 2000 members in 18 private schools, universities and colleges by the end of 2008,
2. Develop a union education policy in order to influence Mongolian education politics
3. Up-date and improve the trade union knowledge of the leaders and members
4. Improve the salary and working conditions of the members

Among the planned activities between FMESU and UEN were:

1. Train 1100 members on 20 issues by end 2008
2. Conduct survey on working conditions and its effect on health of teachers.
3. Improve communication and offices of the 11 FMESU branches by the end of 2008
4. Produce information and training material: Newsletters and Trainer's manual
5. FMESU Constitution and booklets about recruitment and trade union rights awareness.
6. Convene 3 policy development workshops for 60 FMESU top leaders by the end 2008

The annual amount for the third phase of the project (2006-8) transferred to FMESU has varied from 25.000 USD to 15.000 USD depending on the implementation arrangements of FMESU. For the three years, the total costs of the project including salary for the project coordinator, UEN's administration and travel costs have been around 120.000 USD (840.000 NOK).

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<sup>12</sup> Interviews with EI, and former project coordination FMESU.

<sup>13</sup> End-report (sluttrapport) to Norad 2005: Annex I; page 8.

## 5 RESULTS

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This chapter will give an overview of the results that have been found in the project based on project documentation, accounts and qualitative sources of information.

### 5.1 Membership – trade union trainings

Increasing the membership of FMESU was one of the main planned goals of the project since the start in 1998. Having many members increases the financial strength of the organisation and its legitimacy and credibility vis-à-vis the government as a negotiation partner. Before the transition period in Mongolia, membership in the trade unions was compulsory. There was no freedom of organisation.

Today there is organisational freedom in theory in Mongolia. However in practice, if, for instance, one school decides to join FMESU, all the teaching, administrative and support staff of the school become the members of the organisation automatically. S/he can insist on not being a member, but that will imply not accessing any trainings and further education and other benefits. Thus very few teachers opt to be outside the union if their peer-teachers are members.

According to statistics from FMESU, there has been an actual decrease from 14.577 members in year 2006 to 14.277 in May 2008. One reason for the decrease is that the *Science Union* left FMESU and took with them 1000 members. The figure was a bit higher by the end of 2008; by December 30, 2008, FMESU had 15615 members including 8257 members from secondary schools, 2361 from higher education and TVET, 4240 from kindergartens, 425 from rural schools, and 332 from rural kindergartens.

Based on the report to FMESU's Congress<sup>14</sup> in 2006, there has been a 15.4% increase in the membership compared to year 2004. 308 schools and KGs are members of FMESU, which implies that 38% of the KGs are members. In the report presented to the Conference in April 2008, FMESU had 15.077 members. The figure included 800 members from the rural areas.

In order to attract more members and be more relevant to the teachers outside Ulaanbaatar, FMESU has conducted trainings in six aimags in 2007 and only two aimags in 2008. One of the FMESU staff described how the consultation process with the rural schools went:

*First we did training for the rural teachers which included:*

- *Orientation of national programs*
- *Theoretical roles of trade unions work, duties and roles*
- *Asked representatives of every school to write down their inputs to the challenges and working conditions they are working under.*

*Every year the project was ongoing in 2006, 2007 and 2008, we visited in total six aimags. Because the funding always came late from Norway, our activities were always in the months of October to December (and never in spring semester).*

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<sup>14</sup> There is a confusion of terminology in English as the Conference is referred to as both Congress and Conference.



As seen below, FMESU has conducted trainings both for recruitment of new members and as training for elected representatives of FMESU. It is therefore a bit difficult to separate the two types of activities.

8000 new members in 12 rural areas was the goal for FMESU, but this has not been achieved. There are at least two main reasons. The issue of restrictions on dual membership in FMESU and CMTU is still not resolved. Although UEN reported that the restrictions were lifted, this was not the case according to the information provided to the evaluation team during the fieldwork. CMTU does not allow FMESU to recruit members in the rural areas. However, according to FMESU, discussions are ongoing to change the CMTU structure.

The other reason is the capacity of FMESU to conducting outreach activities outside Ulaanbaatar. Distances are great in Mongolia and the infrastructure/transportation for accessing rural areas is weak. 40% of the population lives in rural areas and thus the needs are great.

In September 2008 after the school year started FMESU executive committee set up a working group to conduct a survey on teacher salaries in relation to the increased inflation raise in the consumer goods. It was found that the salaries were not compliant with the increases. A series of meeting were held with MECS officials including the deputy minister, state secretary, and heads of departments. A number of press conferences and a gathering of 800 elected leaders at the Sukhbaatar square, the main square in the capital city, as well as other actions were also taken. In December 2008 FMESU challenged the MECS that all teachers will go on strike if the salary was not increased. After long discussions and negotiations, the MECS agreed to give up to 10% bonus to every teacher from the education budget residue.

Another great achievement that seems to have been much to the benefit of the project is to promote gender equality in FMESU leadership. According to FMESU statistics, before the Conference in 2004, there was 27% female representation, after the Conference the percentage had increased to 55%.

Summing up it can be stated that the goal has been partly achieved of increasing with around 2000 new members in the project period. Including women in decision-making position is a clear achievement of the project (coordinator) and staff.

## **5.2 Trade union trainings**

FMESU's staff and representatives trained 1372 members; mostly leaders and chair-people (not regular members) in the topics of Collective bargaining, contracts, labour law etc. While the training in the rural areas have been related to recruitment.

The topics and themes that have taken place during the training have been: school budgets and trade union, Professional Ethics, Changing Culture at School and Ethics of School Administrators, Grievance Handling and Labour Dispute Settlement Commission, Problems Encountered in Labour Relations, Labour laws and Labour relations, Labour safety and Hygiene, TU skills training for new members, women leader and young leaders (leadership types, communication skills, trade union communication, training techniques, meeting

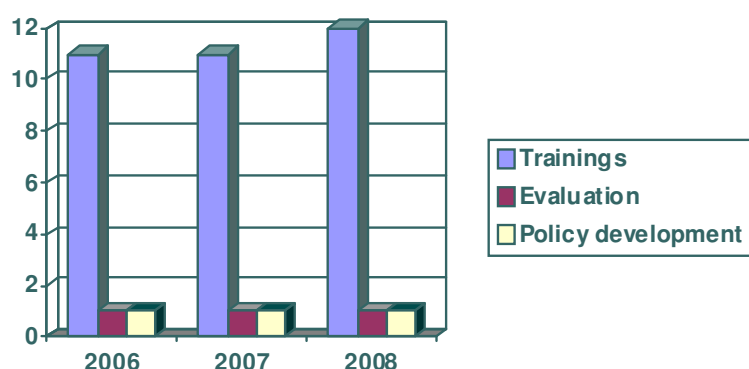
procedures, introduction to collective bargaining etc. )

The training materials were well compiled and filed by the project coordinator in 2008. However, the compiled materials consisted of only printed copies of presentations; rather than being a complete package with training agenda, lists, instructions, and guidelines for activities, and other support materials for easier reference for later use.

The majority of the trainings are on trade union issues such as introduction to trade union, collective bargaining, etc. Other interpersonal and personal skills development training workshops are offered to members as well.

From the training agendas and lists of training participants it was evident that absolute majority of the trainings are organized for trade union and group leaders and elected officials at various level rather than being for ordinary members. It might have been assumed that those elected leaders would deliver what they learned to their colleagues at schools. However, during the visits to schools and kindergartens it was found to be done in an incomplete way; they only seem to inform the teachers about the training they attended instead of organizing a workshop on the topics they received during the trainings.

**Table 1 Project Workshops 2006-8**



As seen in the table above, the number of trainings related to recruitment and union issues was stable in the first two years of the project – 11 training seminars each year. These seminars were verified by the evaluation team. In 2008, during the field survey the team was only able to verify seven seminars/workshops. However information was forwarded later and in total the number of workshops held added up to 12. FMESU has held an evaluation and planning workshop each year; in 2006 and 2007 representatives from UEN and EI took part, while for 2008, only EI attended. UEN did not attend that seminar due to the fact that there had not been any substantial progress on the points agreed on in the MOU signed between FMESU, UEN, EI and CTF in October 2007.

### 5.3 Education policy

A key goal of the cooperation was to support FMESU in developing its own education policies. In the whole project period, three policy development workshops have been organised along

the themes of increasing enrolment/decreasing drop-outs (2006), salary structures, and basically how to develop education policy for TU leaders. In December 2006, UEN sent two of its elected representatives to assist FMESU in developing an education policy. According to the trainers' report<sup>15</sup> there was a good engagement among the teachers and the discussion in the two-day seminar was fruitful. The evaluation from the former project coordinator was that it was useful to have elected representatives such as these because they are teachers' trade union activists from their own country and has practical experience. The only weakness pointed out with regards to this training was the challenges in language and communication due to English/Mongolian. The same impression was repeated also for the workshop when the same UEN elected representative spoke about how UEN work in Norway; how it negotiates with the government etc.

Although FMESU had plans to complete the work that started in the December 2006 workshop into a proper policy document, this never took place. The evaluation team understands that both UEN and FMESU had underestimated the amount of work and time that would be needed in order to develop such a policy. A workshop of the kind conducted by the Norwegian UEN trainers was highly relevant and useful, but more follow-up and systematic technical support from UEN would have been needed in order to complete it.

The planned survey on teachers' working conditions was not done. The reason is the same as above, an underestimation of the amount of work needed in order to produce a fully-fledged survey that could serve as a knowledge base for the government.

FMESU does not have a unit or department for knowledge production/research and analysis of issues related to access and quality of education, following international processes like Dakar's Education for All and the Global Campaign for Education. More importantly there is network of educational NGOs, UN and international agencies that coordinate with the MECS on joint education programming in Mongolia. FMESU is currently not taking part in these networks and arenas. This is probably related to the tradition of FMESU to focus on the legal labour rights more than the contents of the education.

The METT program funded by CTF is an interesting exception because the METT has greatly enhanced FMESU's competence on teaching English as a second language by introducing new and innovative teaching methods. Teachers in other subjects than English have asked FMESU to teach them these methodologies for their subjects.<sup>16</sup>

## 5.4 Outreach

Reaching teachers and members outside Ulanbaatar (UB) was a clearly defined goal in the project cooperation already in the first phase of the project from 1998.

A first step planned by FMESU was therefore to establish branches in the outskirts of UB in order to start with a middle level in the organisation. The idea was that these branches would assist the central office of FMESU in collecting the membership fees and support the members

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<sup>15</sup> Baard Kristiansen and Johan Softeland, Report from 13-15 December 2006 (in Norwegian; Rapport / oppsummering av Mongoliatur 13-15. desember 2006)

<sup>16</sup> Inputs from Workshop with FMESU Executive Council 21.01.09

in their work places as there would be less of a distance from the Branches to the members than the central office. The idea of branches were approved by FMESU's Conference and written into the revised FMESU Constitution 2000 (§4.1). Until year 2000 FMESU had never any middle-level units but the union realised that it as very difficult to work with all the small units (thousands of KGs, school) from the central office in UB. If a district had more than 500 members it could establish a branch.

The Constitution's section on structure stated that the Federation should consist of three levels:

1. TU committees, some committees shall comprise of TU groups
2. Territorial units (branches)
3. Federation

In the planning and evaluation workshop of FMESU in May 2006, the members of the Executive Council reconfirmed that outreach should continue to be one the goals of the project cooperation: "improve communication and office facilities of 11 FMESU branches by the end of 2008".<sup>17</sup>

FMESU established six districts in UB as branches. With the support of the project, three of the branches were equipped with computers and office equipment in order to improve the communication in 2005. The branches elected branch leaders that communicated with FMESU centrally and the school leaders and collected the dues on behalf of the Federation.

When a new president of FMESU was elected in May 2007, the leadership decided to dissolve the branches. The computers were brought back to FMESU and utilised supposedly by FMESU staff. In the next Conference in May 2008, the Constitution was amended again and the Section of the Territorial branches was removed.<sup>18</sup>

As seen above, FMESU did conduct some work in the aimags in the project period; six aimags were visited in both 2006 and 2007 (Bayankhongor, Darkhan-Uul, Dundgobi, Selenge, Gobisumber, Dornogobi), while for 2008 only two aimags were visited in order to promote recruitment; the provinces of Tuv and Ovorkhangal. This implies that only one third of Mongolia's 21 provinces have been visited during three years.

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<sup>17</sup> Minutes from Evaluation and Planning workshop May 2006.

<sup>18</sup> This change in the Constitution corresponds to several other revisions that centralises more of the power in the hands of the president, for example, in §6.7 and §6.8 decision-making authority have been moved from General Secretary to the President, especially with regards to financial affairs.

## 6 PARTNERSHIP COOPERATION

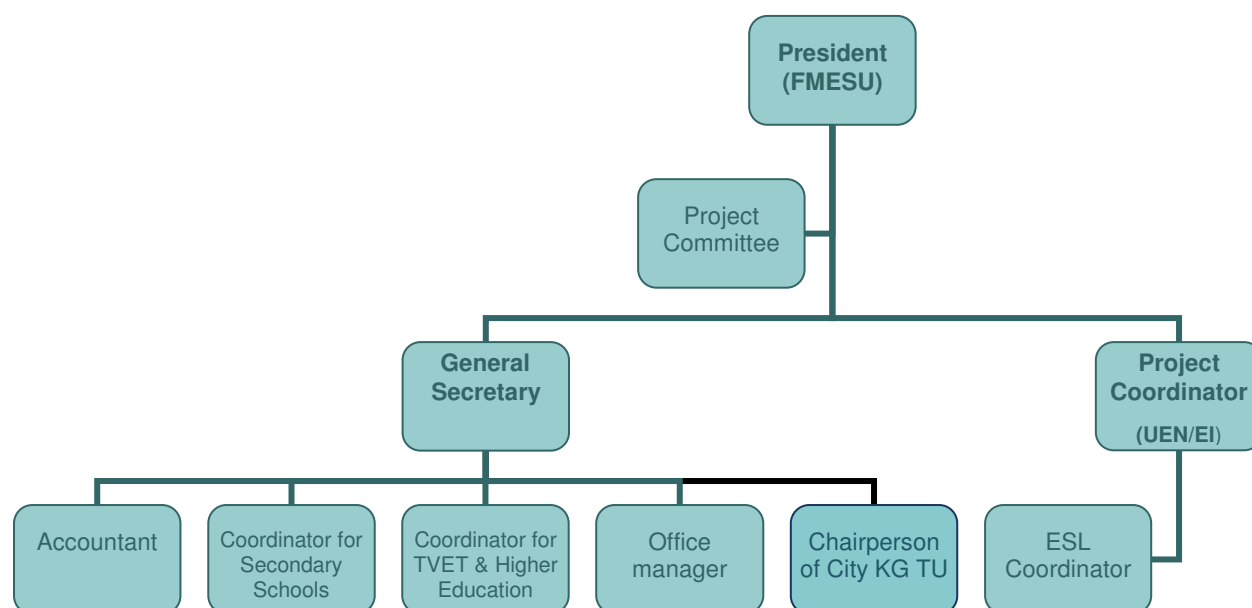
### 6.1 Project management

A project coordinator has been employed in the project since the start up of the project cooperation in 1998. In the first ten years it was the same person who held the position. In August 2008 a new project coordinator was appointed by the Executive Council when the previous was elected General Secretary of FMESU.

According to the organisational structure<sup>19</sup> (see figure below), the project coordinator reports directly to the president and the project committee (where the president and general secretary are members). The ESL-coordinator position funded by CTF reports to the project coordinator, who retains the overall responsibility for reporting to the international partners.

By having separate reporting lines, the project staff does not report to the General Secretary like the other FMESU staff. The project staff is treated different with regards to social benefits as they are not considered regular FMESU employees.<sup>20</sup> This finding is substantial because the goals and objectives of the project are integral to the union's overall mission and vision, however the project is not integrated organisationally and financially in the union.

**Figure 3 FMESU Organisational Structure**



Regarding the Project Committee, EI suggested establishing it as a support function for the

<sup>19</sup> FMESU has not recorded its organisational structures, so the team developed the above figure based on interviews and the job descriptions of FMESU staff.

<sup>20</sup> Until August 2008, the salary of the project coordinator was paid directly from EI's office in Kuala Lumpur, and income tax was declared by project coordinator individually. Thus the project coordinator did not obtain social benefits that other FMESU staff gained.

project coordinator<sup>21</sup> in the first phase of the project in 1998. At that time, it was still a new idea for the teachers' trade union to have "projects" with foreign donations. There was some resistance against this new idea among the elected representatives from the "old guard". However the president of FMESU agreed and the project committee was incorporated as one of standing committees written into the Constitution (§5.12).

Draft Regulations for the Project Committee was tabled, but never finalised. The regulations state that the tasks of the committee are to plan, monitor and implement, and meet at least once a year. The structure should be five executive committee members: the president, general secretary, project coordinator, one representative from the schools/KGs and the treasurer. The Chairperson of the project committee nominates or recommends while the Executive Council approves the composition.

The evaluation team reviewed all minutes of the project committee since 1998 and found that the project committee has been active some years, and been less active other years. On average it has met once a year. Minutes have never been signed or approved. Often there were no minutes found from the meetings. The frequency of meetings in the project committee seems to have gone parallel to the commitment of the president of FMESU. It is not clear who calls for the committee meetings, but from interviews it was understood to be the president. But more importantly, the minutes lack clear decisions. The project committee seems to have not been authorised to take decisions.

As the Draft Regulations have never been finally approved by the Executive Council, there is a need to revise the regulations to include issues like:

- Frequency of meetings
- Minute-taking
- Filing
- Signed by attendees
- Who should call for meetings?

The project files and archives were found to be well kept, and during the last year the project coordinator has exerted great efforts to systematise the files and produce printed reports based on the training seminars.

Because the project committee is composed of elected members, the members often change every election and this leads to a fragmentation of responsibility. It is clear that the institutional memory of the project rests with the former project coordinator. Although the new project coordinator has been active with FMESU, and especially the English METT programme for many years, she does not have the fully overview of the UEN project. A complete hand-over of information, contacts, files and reports did not take place in August 2008 when there was a change in coordinator position.<sup>22</sup> Linked to the finding that information is not easily shared in FMESU this leads to institutional gaps and lack of continuity in the organisation.

The Executive Council members who took part in the Introductory workshop highlighted in their

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<sup>21</sup> The first mentioning of a project committee is in the minutes from the project planning meeting between NL and MTU Document in file, minutes from Evaluation and Planning meeting 24-27 April 1998

<sup>22</sup> This is a disputed issue by the former project coordinator who believes that there was a sufficient hand-over period with the new project coordinator.

presentations from the group work that the development of the 2006-8 plan which took place over a three-days period in May 2006 was a highly participatory process. The fact that the members had been instrumental in planning the project expected results and activities led to an unprecedented degree of ownership among FMESU's elected representatives. Until this workshop in 2006, the members had not been invited in to plan a project in detail. When assessing the Executive Council's involvement in implementation, follow-up and monitoring of the project some weaknesses are detected. According to many of the interviewees, project progress reports and detailed accounts have not been shared on a regular basis; activities were planned haphazardly with no long-term strategic plan. This weakness however must not be ascribed to a lack of willingness to share information only, the fact that UEN has issued late notification of approval of funding and late transfers of fund have been equally important factors in this issue.

## **6.2 Financial management**

The team assessed the financial management of the project by reviewing the financial records; sampled a selection of invoices/supporting documents and interviewed the accountant (volunteer), the former procurement officer (also volunteer) and the external auditor ONCH-AUDIT.

FMESU does not have a financial manual for regulating the financial routines and systems. The membership income is handled by an accountant under the supervision of the General Secretary and monitored by the Executive Council (including the President) and the FMESU Conference which meets every three years. Until 2007, the project coordinator did all the work related to the project finances; the bookkeeping, procurement and preparing financial statements that were submitted to UEN/EI, in addition to the regular planning/monitoring of activities. The project coordinator acquired many of the skills by working and she received training and guidance from the external auditor.

Due to internal conflicts in FMESU between the former General Secretary and the Project Coordinator, a new agreement (MoU) was concluded between the four partners (CTF, EI, UEN and FMESU). The MOU signed in October 2007 redistributed roles and responsibilities from the project coordinator to three different positions; a new financial officer position was established, a procurement officer (volunteer) was appointed and the project coordinator continued to be in charge of the remaining regular project activities. The MOU was an effort to improve the project management.

However, following the MoU, there was no systematic monitoring by EI or the international partners with regards to how the new system worked. Since October 2007, there has been no visits by UEN to FMESU, and EI has had one visit. The lack of follow-up and systematic monitoring of implementation of the MOU contributed the problems in meeting the deadlines for the 2007 narrative and financial reports (see below).

After a financial officer was appointed by the FMESU project committee and approved by EI (who agreed to pay the salary) in late 2007, he left after a few months. There were different explanations as to what happened. According to the external audit report for 2008, "the former Project financial officer is responsible for the shortage in funding (992USD) and it is resolved to

file a case with the court. However at the time of the external audit, the [FMESU] management has not initiated the filing of the case to the courts.<sup>23</sup>

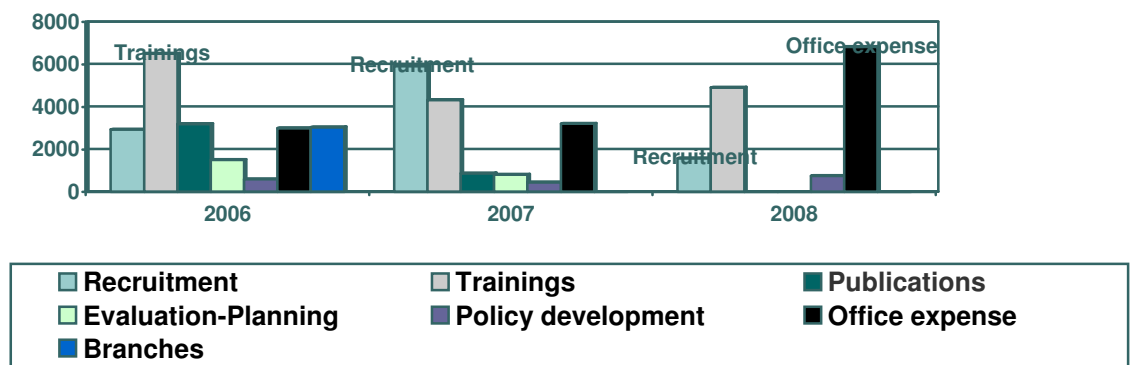
When the financial officer left FMESU the volunteer who had been appointed to work as a procurement officer took over his responsibilities. The result of the above-mentioned events was that when the year 2007 ended, nobody in FMESU took the responsibility to ensure that financial accounts were settled and submitted to the external auditor. The external audit report was finally submitted in August 2008 (instead of 1<sup>st</sup> March which is the deadline). UEN which is supposed to submit the external audit reports to Norad suffered from the delay as Norad questioned UEN's routines and work methods when such delays could occur.

Another issue which has been greatly improved in the last years of the financial management is the procurement policies. The Executive Council approved on July 9, 2007 the Decision on Procurement regulations which included a ceiling (above 50.000) for procurement that require a tendering process of at least three bids.

Due to the financial project cycle of UEN, transfers to the partners always come late. UEN insists on waiting for receiving the audited accounts annually – and for the audits to be approved by UEN's central auditor in Norway, before the first instalment can be released.

In the period evaluated, the earliest transfer was made in end of June (FY2006 and 2007), while for 2008 the transfer of funds took place on 3<sup>rd</sup> October. The delay in transferring the funds seriously impeded the planning of the project activities and leaves only two-three months (October – December) for implementation. The issue of delayed transfers to partners was raised in NCG's Performance review of UEN (Claussen/Ingdal/Vedeld, 2008).

**Table 2 Project expenses distributed on activities (in USD)**



As seen in Table above when analysing how the project budget has been expensed, there has not been any major deviations from the budget. In 2006, most of the funds were spent on trainings as planned. However in 2007, fewer funds were diverted to trainings and more towards recruitment activities like meetings for recruiting members in the districts. For 2008, the office expenses have increased greatly, but this is due to the fact that the salary for the project coordinator was until mid-2008 paid directly by EI/UEN to her account, while from

<sup>23</sup> ONCH-AUDIT, independent auditors report for year ending December 31, 2008. Notes to Financial Statement, page 3.



August 2008, FMESU started paying the new project coordinator directly from the funds transferred to FMESU.

In 2006, FMESU had three branches in Ulaanbaatar that had been supported with computers and some equipment in order to enable them to serve the teachers members. With the election of a new FMESU leadership in 2007, the Conference decided to dissolve the concept of Branches. Thus, the Branches were taken out of the Constitution and the computers and equipment were brought back to FMESU's central office and utilised by the staff and elected representatives there.<sup>24</sup> At the moment there are six branch leaders - intermediary representatives at district levels - working as liaisons between FMESU and member schools. They are elected from and by the school TU leaders and work on a voluntary basis. The names of the district leaders are as follows;

Chingeltei district – S Dorj, School No 49

Khan-Uul district – Ts. Jargalantuul, School No 15

Bayangol district – N. Gaav, Erdmiin undraa complex school

Bayanzurkh district – Ch. Altantsetseg, School no 92

Sukhbaatar district – Ts. Purevjal, School No 35

Songinokhairkhan district – Sh. Oyunchimeg, Ireedui complex school

For the budget item publications, in 2006 the Constitution of FMESU was published in Mongolian language along with a small study on drop-outs in the schools conducted by the union. In 2007, two newsletters were co-funded with FMESU and for 2008, no funds have been spent on publications.

### **6.3 Communication**

Assessing the lines of communication internally in FMESU and externally between the partners, the team found that there had been serious constraints on both levels of the communication, something which has effected the project implementation.

On the internal communication, there was a clear sense of rivalry and lack of sharing information between the staff and representatives in FMESU. Information related to the project; budgets, travels, plans were not shared. There was no team spirit among the staff and elected representatives. There were claims that all project documents were only in English language and thus not accessible for the other staff of FMESU, but this was found to be not correct. The team found several project documents translated to Mongolian language.

Related to the internal communication, FMESU does have staff meetings every Monday for the staff that reports to the General Secretary. The project coordinator (and ESL-coordinator)

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<sup>24</sup> FMESU does not keep a fixed assets registry, so the evaluation team was unable to verify that the equipments had actually been brought back.

which reports directly to the president is therefore not included automatically in these meetings, although there have been attempts at including her. According to the General Secretary the Monday meetings are only for staff not for project issues, as these are to be discussed in the Project Committee. However, the regular FMESU staffs are involved in membership activities that are paid by the project, and thus it would be naturally that they are informed about project plans and budgets.

Project plans need to be made annually, and in a participatory way so that all staff are informed about which activities will take place at which times so the project's activities are integrated and harmonised with the regular recruitment and training work of FMESU.

As with most trade unions in the world (in Norway, Canada as well as Malaysia), there has been power struggles in the Mongolian teachers union. The reason for mentioning it in this report is that the international partners of UEN and EI have engaged in these struggles, and not always with a positive outcome.

The international partners' intervention in the internal conflicts has influenced the external communication between the elected leaderships in the unions. Because the project coordinators in both Norway and Mongolia have kept the lines of communication open, and there has been a conflict between the president and the project coordinator, this has negatively affected the relationship between the elected leaderships in the two partner unions.

## 7 OVERALL ASSESSMENT

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In this chapter the main conclusions on assessing the project along the criteria of relevance, effectiveness, efficiency, sustainability and value-added of UEN are summed up.

### 7.1 Relevance

When assessing the relevance of the project that has been implemented by FMESU, the team assessed different levels:

- relevance to FMESU's ordinary members
- relevance to FMESU leadership and elected leaders
- relevance to Mongolian teachers in general

During interaction with members of FMESU and non-members, there is a clear perception of FMESU as a union whose main mission is to protect teachers from violations in their work place and promote their rights to a decent salary. FMESU has traditionally – and continues to - work for the “bread and butter” of its members, not the professional quality of the teachers.

Taking into consideration that FMESU has obtained substantial results in increasing teachers' salaries, most notably November 2008 when FMESU was able to push the Government to release the salary fund<sup>25</sup> it is clear that FMESU is more known for this than for its work in promoting quality education for all Mongolian children. Nevertheless, the project which has focused on increasing the membership of FMESU (and thus strengthens its financial strength) is thus perceived as relevant to regular members.

The project's trainings on collective bargaining, labour laws and trade union rights have mainly targeted the two levels leaders of FMESU; 27 leaders in the Executive Council, the Auditing Committee and the 9 district council leaders. And on the second level, around 350 school, kindergarten, vocational and university TU chairpersons and committee members.

The relevance is thus higher for the leadership than the ordinary members. Keeping in mind that limited budget of the project, it would not have been advisable to spread the funding too thin on too many activities, but rather focus on fostering leadership qualities in FMESU.

An indicator of the project's relevance is that FMESU own contribution to the project gradually increased in the early years of the project from 2% to 15% in 2005. After 2005, the leadership of FMESU decided to stop their contribution to the project. Due to changes in the leadership of FMESU (and the team did not interview the former president nor former general secretary) it was not clear whether FMESU's decision not to contribute with its own funds to the project was a result of the union attaching less importance to the project, or whether it was just a technical issue that was forgot when accounts were made. It could also be mentioned that FMESU has

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<sup>25</sup> See chapter five for a description of what has been labeled the 'Salary Fund'.

contributed for the year 2008 with both the accountant and the procurement officer who work as volunteers for the project.

## **7.2 Effectiveness and efficiency**

The project has obtained some of its goals, i.e. the membership has increased slightly and some trade union leaders have become more aware and better informed about issues of collective bargaining, salary and rights. A major achievement of the FMESU is that it has managed to increase the salaries for the teachers. However this achievement cannot be directly ascribed to the project intervention. Indirectly one might assume that the cooperation between the international partners have raised the awareness and level of knowledge of the leadership and thus contributed to the achievement. Here it might be mentioned that the General Secretary, who worked as a project coordinator for ten years, played an important role in the salary fund-issue, and she has clearly developed her skills and knowledge through the project cooperation.

UEN has had a strong focus on gender in its approach to FMESU. When the project cooperation started in 1998 there were very few female teachers in the leadership of FMESU. Although the majority of the teachers are female, few of them were in the leadership. In the first years, a clearly defined goal was thus to promote the participation of women in the leadership. At one point, FMESU's constitution introduced a gender quota, that one of the two leadership positions (president and general secretary) should be a woman. Now this has changed. The Executive Council today is a female-dominated body - only 13 men (of total 68 members) sit in the council.

Assessing to which extent the project has chosen the least costly resources for implementing activities, the team found that the costs of the trainings were in line what is the general cost level in Mongolia although the per diem rates varied considerably from provinces and types of activities. FMESU is not using the governmental per diem rates<sup>26</sup> that are generally used as a standard for many organizations, but in most cases higher.

FMESU's (female) representatives do lots of volunteer work and this increases the cost-effectiveness of the project. However, having volunteer staff conduct key tasks like accounting and procurement is not advisable as it could jeopardise the quality and results. The team would therefore advise FMESU to take a second look at how to organise the bookkeeping and procurement for projects.

The main weakness related to the project's efficiency is the delayed transfers of the funds from UEN to FMESU. The delays led to only three effective months for implementation of activities (October – December) while if the funding came earlier, the activities could have been spread out throughout the year.

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<sup>26</sup> According to the Finance Minister's decree No 64 of Feb 27, 2006 that is in effect at the moment, daily per diem for aimag centers is MNT 15 500 and for Ulaanbaatar, Darkhan, and Erdenet MNT 23 500.

### **7.3 Sustainability**

Strengthening the teachers' trade union's financial capacity in order for it to sustain itself has been a key objective of the project. By increasing the membership the union would become stronger and more influential partner vis-à-vis the government in negotiating on behalf of its members. This has clearly taken place during the project period, however it is not straightforward to assess how much of that can be ascribed to the project.

FMESU does not issue institutional audited accounts. The team is therefore unable to state how much UEN's financial contribution (and the other grants from CTF, JTU etc) amounts to in percentage of the total incomes of FMESU.

The project's results can be seen as sustainable as they have been at the core of FMESU – and thus they will be continuing to some extent irrespectively of whether funding is continued or not. This is contrast to the METT program which was assessed parallel to this project whereby it is clear that once the funding for the ESL centre and the coordinator stops, there is a great risk that the program will also come to an halt unless something is changed in the current structure of METT (by introducing some fees for the teachers benefiting from the English teaching).

The fact that the project was designed by FMESU's Executive Council and elected representatives in a joint workshop can therefore be seen as success criteria for this project.

### **7.4 Value-added of UEN – future role**

What is the value-added of UEN's role and work in Mongolia? What is it that UEN brings into the partner cooperation that produces better results than if the funding alone had been transferred to FMESU?

First of all, UEN has been a strong supporter of introducing the concept of "projects" into FMESU – in which there was a strong resistance in the beginning. This resistance was the stated reason for why UEN and EI decided to pay the coordinator her salary outside the project budget and transfer funds directly to her from EI's regional office in Malaysia. The costs of the project coordinator salary have therefore never been revealed to FMESU's elected bodies and meetings.

Although this might have been pragmatic in the start up of the project, it should have been changed many years ago. By paying a FMESU staff outside the institutional cooperation (between UEN/FMESU/EI) this seem to have reinforced tensions as it indicates that the international partners do not have sufficient confidence in the institution for handling salary payment to one of their own staff.

Secondly, the main value of UEN has been to provide elected representatives from Norway to conduct trainings in Mongolia. These trainings received an overall good score in terms of content. The weakness has however been that the workshops have not been scheduled as part of an overall strategic plan for FMESU. The learnings from these seminars have thus not fed into an ongoing process; the workshops have been bits and pieces of 'useful' information for the members, but not a systematic planned learning process.

The value-added of EI is probably easier to assess. There is a legitimate reason for UEN to reflect and discuss on its own role and intervention to partner/sister trade unions vis-à-vis EI. EI plays an important part in coordination of national efforts and that UEN through its dialogue and coordination with EI reduces the risk for duplication and/or fragmentation.

Clearly UEN is a member of EI and there is a close working relationship. Nevertheless, EI and UEN are two different organisations. The funding comes from Norad, and thus UEN needs to justify its own 'value' and reason for supporting the Mongolian trade union vis-à-vis Norad. The technical support provided by UEN's elected representatives of how UEN works and how to develop an educational policy was received positively by the FMESU members, but the intervention was too brief and not systematically monitored by UEN's international department who ended up becoming involved on one of the sides of the internal conflict in UEN. Although the reasons are fairly understandable, an unintentional consequence of UEN's involvement was to reinforce the internal conflict between the project coordinator and the general secretary.

How to deal with internal conflicts in the partner organisations is therefore an issue that UEN could explore more systematically across the countries it is working in. It is a fact that due to the political nature of the solidarity work that UEN is doing, there is bound to be internal power struggles in the local sister trade unions around the world as well as attempts at manipulating the international donor partners. There is no straight-forward answers to how UEN could have dealt differently with the conflicts in FMESU, but with UEN's accumulated experience in the field - dealing with internal conflicts in its own organisation and among partner organisations, UEN would benefit from systematising some of those lessons learnt and reflections into its strategy for the development cooperation/solidarity work in order to be better prepared next time it occurs. Being more aware of how to work along the "do no harm" principles (Mary B. Anderson) would also help.

UEN is currently deliberating which countries they need to phase out from as the organisation does not have the capacity to continue working in 17 countries. For Mongolia, UEN has supported the partner union for ten years, and it could be argued that FMESU is strong enough to be on its own. Also, looking at the progress that has been achieved in FMESU with regards to opening up the trade union for foreign sister organisations and democratising, there is still a sense that FMESU would benefit from having the cooperation of EI and UEN for another five-year period if some changes of direction be observed:

- UEN, FMESU and EI (and CTF) need to communicate and learn from each other at the leadership level, not only project coordinator level.
- FMESU top leadership (which is shared with CMTU presidency) need to ensure a decentralised decision-making process with regards to project activities like developing education policies and trainings.

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## **ANNEX 1 – TERMS OF REFERENCE**

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### **Evaluation of the Mongolia English Teachers' Training (METT) program and the cooperation between FMESU and UEN on trade union aspects of work**

#### A Partnership between

Education International (EI) Asia Pacific Region

Union of Education Norway (UEN)

Canadian Teachers Federation (CTF)

Federation of Mongolian Education and Science Unions (FMESU)

#### **A General information:**

**Evaluation Team:** The sponsoring partners have appointed an Evaluation Team to conduct the evaluation and to provide a report to all partners. Ms. Gerda Notacker was identified by CTF and Nora Ingdal by UEN.

FMESU will appoint an independent Mongolian consultant that speaks English fluently and is experienced in the field of the Mongolian education sector and trade unionism. The partners have mutually agreed on the appointees.

FMESU will provide the logistical support necessary for the team to conduct the evaluation, but the team will operate independently of the sponsoring organizations in gathering data, analyzing and interpreting the data and drawing conclusions from the data. An agreement is in place between the sponsoring organizations for funding the evaluation process. Once these terms of Reference are agreed upon by the sponsoring organizations the Evaluation Team will conduct its work within those parameters.

**The evaluation team members and their roles:** The two different cooperation projects CTFs METT program and FMESU-UENs trade union cooperation are quite different in their content and aims. That will make it necessary to have different approaches to the work and that is also the reason for why appointing both a Canadian and a Norwegian consultant to the work. The task of Ms Notacker and Ms Ingdal therefore need to be defined related to B in this terms of Reference for Notacker and to C for Ingdal.

On the other hand both evaluators should as much as possible contribute to the other evaluator's work as far as the overall aims of this evaluation concerns: the capacity of FMESU in meeting the expectations as a trade union and an important stakeholder in the Mongolian Education Sector.

The independent Mongolian evaluator is asked to interpret the contextual situation concerning the two programs of cooperation, reduce language barriers and contribute to the overall aims of the evaluation work.

#### **Purpose of the Evaluation**

CTF in co-operation with Union of Education Norway (UEN) are conducting a joint evaluation of the programs supporting FMESU since 2003.

The purpose of the evaluation of the METT component is to determine if the goals have been met based on established indicators and to what extent the program has had an impact on the professional development of teacher participants. It will also provide a basis for future decision-



making about the sustainability of the current project and capacity for implementing further programs.

The purpose of the evaluation of the UEN-FMESU cooperation is to determine if the goals have been met and to what extent the program has had an impact on the overall professionalism of the union on all levels. It will also provide a basis for future decision-making about the sustainability of the current project and capacity for implementing further programs.

### **The Report**

The Evaluation Team will prepare a written report for submission to the sponsoring organizations. The Report will include:

#### Executive Summary

- I. Context, origins and objectives of the PDP project
- II. Description of the PDP project components and activities
- III. Purposes of the evaluation and description of evaluation methodology
- IV. Evaluation Findings
  - Themes from the narratives of teachers
  - Concrete data on participation
  - Observation of other stakeholders
  - Factors contributing to success
  - Obstacles in implementing the program
  - Impact of the project
- V. Conclusions
- VI. Recommendations

#### Appendices

- A. Evaluation instruments
- B. Statistical data
- C. Participants in evaluation process

The report will be prepared in English and Mongolian. A draft will be provided to FMESU, CTF and UEN to review prior to preparation of the final report. The Evaluation Team will accept changes for factual accuracy and will consider other comments that would improve the quality of the report. The Evaluation Team will maintain independence with respect to the conclusions and recommendations. One copy of the Final Report will be provided to each of FMESU, CTF, EI, UEN and CIDA.

### **Calendar**

October 2008	Initial Planning (Oct. 9/10): In Ottawa, Gerda Notacker with Liz Spence, Cassie Hallett, Beth Schubert and Barbara MacDonald-Moore. In Ulaanbaatar, Liz Spence and FMESU representatives - reviewing documentation and timelines.
October 2008	Distribution of questionnaires, initial planning for the Evaluation.
December 2008	Initial Planning in Oslo : Nora Ingdal, Lajla Blom and Kathrine Blyverket
19-28 January 2009	Evaluation Team Meeting – Ulaan Baatar
February – March 2009	Tabulation of Questionnaires by tabulators

Analysis of Key Informant interviews – Gerda  
Analysis of teacher participant interviews – Gerda

- April 2009                      Completion of draft report to be delivered electronically to FMESU, CTF and UEN
- May 2009                      Workshop/seminar where evaluation team will present the draft report for validation and discussion between CTF, UEN, EI, FMESU<sup>27</sup>
- May 2009                      Response to draft report to be received by Evaluation Team (e-mailed electronically to both members)
- June 2009                      Final Report delivered to CTF, UEN, FMESU, EI and CIDA

**B        The METT program (valid for Canadian evaluator only – removed from this TOR)**

**C        FMESU-UEN cooperation (For Nora Ingdal & Batjargal Batkhuyag)**

### **Background**

FMESU (former Mongolian Enlightenment Federation of Trade Unions – MEFTU) and UEN entered into a partnership in 1998. The current agreement came to a close in 2005. On the basis of past experiences during the cooperation, a new partnership agreement came into effect from 2006 and ends in 2008. The overall coordination of the cooperation was assigned to Education International and its regional office in Kuala Lumpur, Malaysia.

The cooperation program was designed to ensure that both unions become influential stakeholders in the education sector at both national and international level, and that the unions through cooperation should work to ensure that their individual governments as well as international organisations place greater emphasis on universal professional rights and quality education for all.

### **Description of the program**

The focus areas in Mongolia were to strengthen FMESU by recruiting more members, develop the union's education policy and up-dating and improving the trade union knowledge of the leaders and members of the union.

The Mongolian union has during the 3-years period 2006-2008 lived through a time of change regarding the highest positions of elected representatives that might have had an effect on the policy direction of the union, which again probably have influenced the work related to the agreement. In the period the membership has increased by 2000 (2005-2007), increased teacher salaries by nearly 30% and conducted training for more members and union leaders than expected. UEN has been asked to contribute to a education policy seminar in addition to

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<sup>27</sup> UEN and the Norwegian evaluator have confirmed their interest in this.

seminars held during the annual planning meeting.

The project has been funded through the Union of Education Norway which includes a significant financial contribution from Norad, the funding agency of development cooperation in Norway.

### **Program goals**

The over all goals were to engage in securing good wages and working conditions for teachers, and to ensure quality Education For All.

Additionally the cooperation should ensure that Mongolian Enlightenment Federation of Trade Unions (FMESU) and Union of Education Norway become influential stakeholders in the education sector at both national and international level. And that the two organisations should through cooperation, work to ensure that their individual governments as well as international organisations place greater emphasis on universal professional rights and quality education for all.

### **Objectives**

FOCUS AREA: Strengthening of MEFTU by

1. recruitment of more members,
2. develop a union's education policy
3. up-dating and improving the trade union knowledge of the leaders and members of the union.

GOALS:

1. Organize 8000 more members in 12 provinces by the end of 2008
2. Recruit 2000 members in 18 private schools, universities and colleges by the end of 2008,
3. Improve the salary and working conditions of the members
4. Influence the Mongolian education politics.

INDICATORS:

1. To train 1100 members of MEFTU on 20 issues by the end of 2008
2. Conduct survey on working conditions and it' effect on health of teachers.
3. Improve communication and the offices of the 11 MEFTU branches by the end of 2008
4. Produce information and training material such as newsletters, trainers manual, the MEFTU Constitution and booklets about recruitment and trade union rights awareness.
5. Convene 3 policy development workshops for 60 MEFTU top leaders by the end of 2008

### **Expected outcomes of the evaluation**

The purpose of the evaluation of the UEN-FMESU cooperation is to determine if the goals have been met and to what extent the program has had an impact on the overall professionalism of the union on all levels. It will also provide a basis for future decision-making about the sustainability of the current project and capacity for implementing further programs.

Areas of consideration for the FMESU-UEN program:

- Goals and objectives of the union in keeping with UEN/CTF/EI and Relationship with Mongolia's Ministry of Education
- Review the extent to which the goals are integral to FMESU priorities.
- Roles of FMESU Project Coordinator and FMESU leadership.

- Has the program enhanced the status of FMESU as an organization perceived as being supportive of improving quality of education for children through the trade union training of its elected representatives and members?
- What recommendations might be made to strengthen this program as it continues or for consideration in the development of other professional development programs for FMESU members?
- Lessons learned that may be useful in this or future cooperation program between UEN and FMESU.
- Expected role of UEN in the future.
- Determination of the level of sustainability of the project, credibility of the program from the perspective of stakeholders other than the teacher participants and FMESU and the impact this has on the status of the teacher organization.

Determination of the level of sustainability of the project in the current or other form

## ANNEX II – LIST OF PERSONS CONSULTED

Name	Position/Title	Institution
Lajla Blom	Head of International Department	Union of Education Norway
Anne Kathrine Blyverket	Consultant International Affairs	Union of Education Norway
Yaw Frimpong	Finance Department	Union of Education Norway
Ganbaatar Sainkhoo	President	Confederation of Mongolian Trade Union (CMTU) and Federation of Mongolian Education and Science Union (FMESU)
Tungalag Dondogdulam	General Secretary	FMESU
Sarantsetseg Dagvadorj	Chairperson, Kindergarten Union	FMESU
Batzorig Jankhar	Coordinator for secondary schools	FMESU
Zorigtbaatar Sukhbat	Coordinator for higher education	FMESU
Bat-Enkh Begzjav	Accountant	FMESU
Erdenekhand Dorjsuren	Assistant, Kindergarten Union	FMESU
Tsetsegdelger Dansran	Coordinator for internal affairs	FMESU
Tsetsegmaa Gendenjamts	Project coordinator	FMESU
Bolorchimeg Bor	Education Specialist	UNICEF
Enkhbayar Demberel	Superintendent	Education and Science Department of the City of Ulaanbaatar
Onchinsuren Dendevsambuu	General Director	Onch Audit LLC
Gereltuya Sevjid	Director	Kindergarten No 129, Bayanzurkh district, Ulaanbaatar
Purevdolgor Byambaa	Director	Kindergarten No 20, Bayanzurkh district, Ulaanbaatar
Nergui Nerendoo	Senior officer for human resource policy and regulations	Department of Primary and Secondary Education, Mongolian Ministry of Education, Culture, and Science
Doljinsuren Otgondor	School manager	School No 65, Songinokhairkhan district, Ulaanbaatar
Battuya Jargal	Teacher of English	School No 65, Songinokhairkhan district, Ulaanbaatar

<b>Name</b>	<b>Position/Title</b>	<b>Institution</b>
Bolor-Erdene Batsandag	Teacher of English	School No 65, Songinokhairkhan district, Ulaanbaatar
Uranbileg Tserendorj	Teacher of Russian	School No 65, Songinokhairkhan district, Ulaanbaatar
Enkhtuya Natsagdorj	Executive Director	Mongolian Education Alliance

*In addition the team benefited from the 65 members of the Executive Council of FMESU who took part in the introductory workshop and presented the results of group work.*

Alonysis Matthews*	Chief Coordinator	Education International, Regional Office Asia
Sagar Nath*	Adviser	Education International, Regional Office Asia

\* Phone/email interviews