

Social Inclusion Trust Fund

ANNUAL REPORT 2005

Summary Report
2003–2005



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FOREWORD

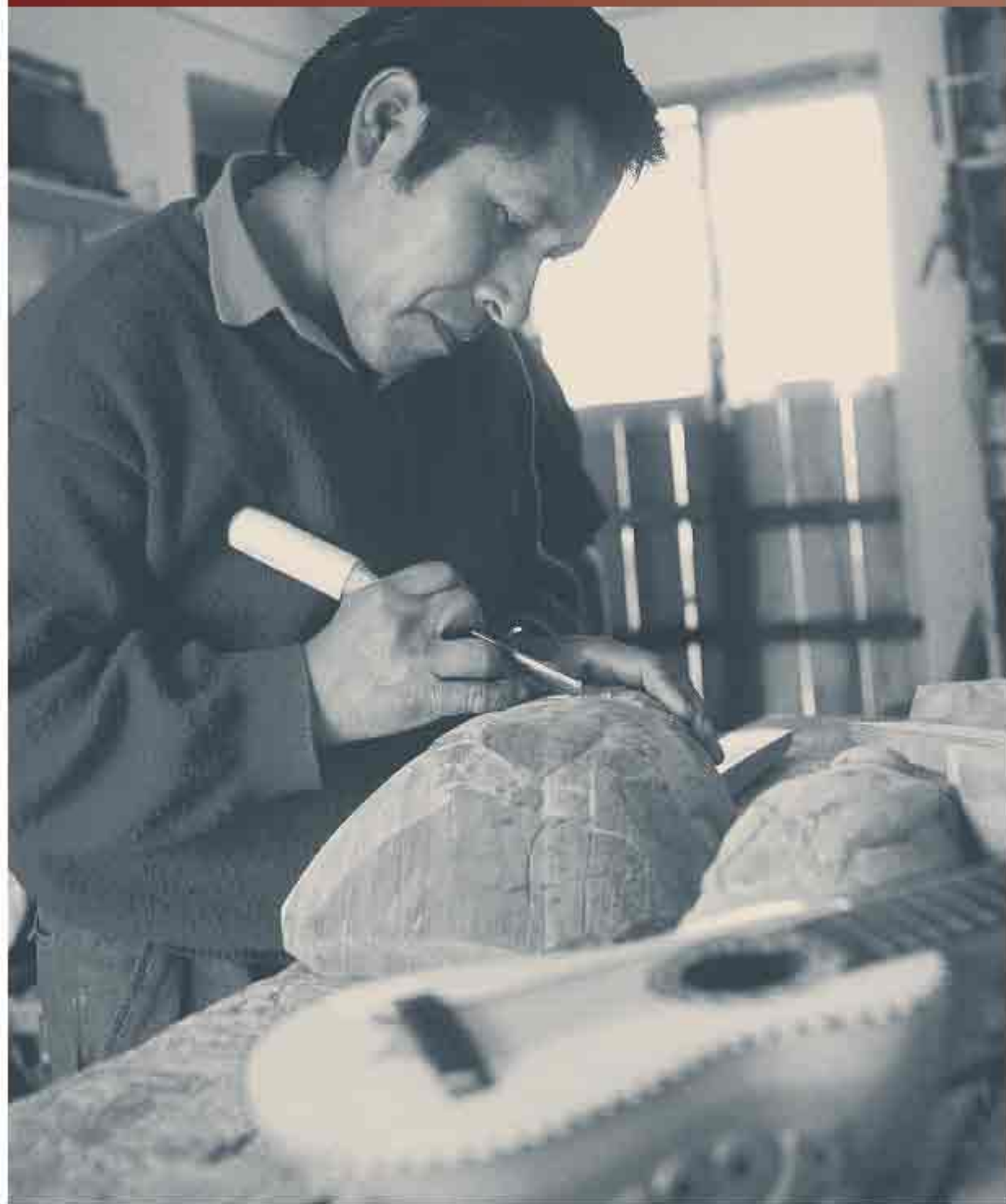
It is with great pleasure that I present the Annual Report for the Social Inclusion Trust Fund for 2005. This report, which includes a summary report of the Fund's first phase (2003-2005) marks a significant period in the development of the Fund by highlighting activities and projects supported over the past three years. The multi-donor Fund, which was established in 2003 as a special initiative supported by the Royal Ministry of Foreign Affairs of Norway and joined later that year by the Department for International Development of the United Kingdom, has the distinction of being the very first thematic multi-donor Fund at the Inter-American Development Bank.

During 2005, in its third year of operation, the Fund has continued to expand and grow, and it continues to be recognized as an essential source of support to projects aiming to reduce inequality in the region. We have also witnessed a change in the region on this issue over time. In response to increased demand we have developed new ways to support social inclusion projects by influencing the Bank's planning cycle in its initial stages, and we have increased efforts to address the urgent need for inclusion of the region's Afro-descendant and indigenous groups, person with disabilities, persons living with HIV/AIDS and poor women within the IDB and in the region.

The Social Inclusion Trust Fund provides a forum and a spotlight to raise the visibility of the traditionally invisible and increase attention given to delicate and complex issues such as discrimination and exclusion, in a multilateral financial institution whose principal mandate is poverty reduction. As is the case with most new initiatives, we are amazed at how much we have learned from our experiences. By strengthening and fine-tuning our strategies we have prepared a solid foundation on which to develop the next phase of work in social inclusion in the region. It is now better understood that the equal and full participation of all groups in a society is fundamental for achieving and sustaining equitable economic growth and development. However, there is still a lot of work to be done in order to bring about change at all levels of society in our member countries. Due to the influence the Fund has had on mainstreaming social inclusion in the Bank and in the region, the Royal Ministry of Foreign Affairs of Norway has generously committed resources to expand its support to the Social Inclusion Trust Fund for the period 2006-2008.

On behalf of SDS/SOC and the Fund, I would like to express my heartfelt gratitude to our donors for their support of this challenging mission. I would also like to encourage increased collaboration with the Bank and other donor agencies on social inclusion with a view to fostering greater partnerships and enhancing the commitment to the work of the Fund. I would also like to thank our dedicated inter-departmental Technical Committee Members for their time and continued support – having such a diversity of experience and wealth of expertise has been an invaluable asset to the Fund. As we look ahead, we must continue to work together at all levels to build on these results and increase our contributions to the promotion of inclusive social transformations and positive change for excluded groups in the region.

Ms. Wanda Engel Aduan
Division Chief
Social Development Division



EXECUTIVE SUMMARY

The Social Inclusion Trust Fund (the Fund), created in 2003 with support from the Royal Norwegian Foreign Ministry and Great Britain (DFID), is compelled at the end of its first three-year period, to review its accomplishments and the remaining challenges to the promotion of social inclusion both within the Inter-American Development Bank (IDB) and in Latin America and the Caribbean (LAC). Through its work, the Fund has maintained a unique position as a reference in terms of relative poverty and inequality issues in the region and it has been instrumental in the promotion of synergies among excluded groups (e.g., integrated concept of social inclusion) and in addressing cumulative disadvantages.

By taking a critical look at the past few years, the Fund is able to identify the processes and initiatives that have the potential to strengthen the impact of the Fund over the long term. In addition, this review allows the Fund to evaluate the effectiveness of its endeavors to: build the foundation needed to conduct sustained and integrated programs and policies to address social inclusion, increase awareness among governments in the region regarding social inclusion as a development objective, augment the Bank's technical capacity to promote social inclusion goals in programming and project work, and build the capacity within local organizations. Despite significant progress made in the advancement of social inclusion within the IDB and in LAC since the creation of the Fund, there is a considerable amount of work that must be accomplished in order to effectively mainstream social inclusion at the Bank and in the region.

This report is comprised of both an annual report reviewing activities and projects supported in 2005 and a cumulative review of the advances made and challenges being faced by the Fund in carrying out its objectives. The report is divided into three sections. The first section reviews the achievements and lessons learned in the first three years of the Fund's mandate, with descriptions of new activities in collaboration with the Social Development Division of the Sustainable Development Department SDS/SOC and other Bank divisions. The second section will focus on the advances made by the Fund both in terms of strategic lines and Fund pipeline. The last section will encompass the scope and reach of current projects with specific project updates, review recommendations for the near future and provide a cumulative report of the Fund's project support since 2003.

INTRODUCTION

nequality, discrimination and exclusion are key factors in the rise in poverty despite economic growth in Latin America and the Caribbean. The region may have little chance of achieving sustainable growth and addressing challenges like the Millennium Development Goals, citizenship, social cohesion and security without tackling the causes of the social exclusion that affect a significant percentage of the population in these countries. The Fund, the first thematic multi-donor fund established at the IDB, is making a difference in this regard.

The Fund is a small but key initiative to reduce inequality that was established by the Bank with founding support from the Royal Ministry of Foreign Affairs of Norway and additional support from Great Britain (DFID) in 2003. The Fund maintained a working capital of approximately 3.1 million dollars over the past three years. To this end, the support from the Fund's donors and the Bank has assisted in advancing initiatives that promote social inclusion by targeting five distinct groups in the region, including Afrodescendants, Indigenous peoples, persons living with the stigma of HIV/AIDS, persons with disabilities and poor women (transversally).

The Fund initiative marked the first attempt in the region to address social exclusion using earmarked funds to target traditionally excluded peoples. It was also the first time that a Fund was being used as an instrument for capacity building and sharing best practices and lessons across countries in the region, between beneficiary groups and among Bank departments.

In response to the region's increasing levels of poverty and inequality, The Fund initiated its work three years ago to promote social inclusion by:

- ◆ Supporting emerging programs and policies that address social inclusion in Latin America and the Caribbean;
- ◆ Raising the level of awareness in the region at the local and national levels on the issue; and
- ◆ Boosting the IDB and regional technical capacity to advance social inclusion in its operations, policies and strategies.

In this manner, the Fund was able to make an impact on the Bank and in the region by focusing its resources in the following lines of Fund activity:

- ◆ Providing Support to Bank Operations;
- ◆ Supporting Research and Dissemination; and
- ◆ Encouraging Organizational Strengthening and Raising Awareness of this issue.

The Fund, with technical and administrative support from SDS/SOC, has become a mechanism that is rising to meet the increasing demands of stakeholders in the region. By providing financial support and a reliable technical framework for the development of innovative approaches to inclusion, the Fund is meeting its challenges head on and moving forward toward a new phase in its development. Based on strides made by the Fund to advance a social inclusion agenda in the Bank and in the region, the Royal Ministry of Foreign Affairs of Norway pledged renewed support for the second phase of Fund programming during the Annual Donors Meeting in December 2005.



Fund Highlights 2003-2005

- ◆ Comprehensive operational guidelines for projects and special policies were developed in 2003, and they still serve as a basis for the Fund's operation and as a model for other Funds at the IDB.
- ◆ The Fund Secretariat's active collaboration with Bank Units and Country Offices resulted in a wider and more diverse range of projects in its second and third year of operation.
- ◆ Projects that have been submitted for the "call for proposals" come from a diverse pool of country offices and Bank sectors, including submissions from sectors that do not traditionally work on inclusion issues, such as the Private Sector Division.
- ◆ The Fund has supported a series of research, dissemination and outreach initiatives with a view to promote increased sensitization on issues such as exclusion, discrimination, affirmative action and rights-based development. Cross linkages between exclusion and inequality have continued to be promoted and highlighted transversally.
- ◆ The Fund developed a Special Line of Activity, approved by the Technical Committee to provide targeted support for Country Papers and Poverty Assessments. The initiative, launched in March 2005, has approved three proposals to date.
- ◆ Almost one-third of the Fund's operations are expected to conclude over the next few months. In 2006-2007, the Fund Secretariat aims to use the resulting experiences to identify and disseminate best practices and lessons learned, assess the impact of the Fund overall and, make the necessary adjustments to reach the Fund's target objectives – sustainable and integrated social inclusion projects and policies.
- ◆ The Social Inclusion Trust Fund received a pledge for renewed support from Royal Ministry of Foreign Affairs of Norway in 2005 that would allow the Fund to expand its operations and build on the foundation of its first mandate over the next three years.



BUILDING THE SOCIAL INCLUSION TRUST FUND: 2003-2005

In the first year, the Fund developed guidelines and procedures to promote the efficiency and transparency in Fund operations. This unique mechanism includes an active Secretariat and an integrated Inter-departmental Technical Committee, which has created a natural space for dialogue on social inclusion among operational specialists from each region and social development specialists from SDS.

During the second year, the Fund emphasized expanding and deepening key building components of inclusion by widening the range of activities supported, increasing the participation of target beneficiaries in Fund projects, and stimulating a more diverse portfolio than the first year. The Fund also strengthened its support of policy processes and links with other Funds in the Bank to promote mainstreaming of social inclusion within the Bank and in the region.

The projects approved in the past reflect the distinct experiences of the Fund's target groups. With increased knowledge and experience acquired from implementing social inclusion operations, there is a growing understanding and acceptance of the correlation between race, ethnicity, stigma and inequality in the region. This, together with the stimulation of new opportunities brought about by the increased availability of research, data, and lessons learned, has made it possible for the Bank's management to foresee greater demand for Bank resources and technical assistance in the area of social inclusion.

Over the past three years, the Fund has also identified that the greatest impact on Bank Operations can be made in the diagnostic process of a country's development and programming needs. In order to support these processes with focused social inclusion input, the Fund's Secretariat stimulates targeted demand by providing technical assistance in preparation of proposals, collaborating closely and maintaining contact with Country Offices, Operations Specialists and civil society, and disseminating lessons learned through different activities and publications.

The Fund's Research Framework¹ has also been important in bringing together and producing knowledge products that inform new approaches to social inclusion. By supporting the gathering and analysis of quantitative and qualitative studies that highlight the impact of social exclusion on targeted groups, the Fund assists Bank Specialists in employing a more comprehensive analysis of social inclusion.

Lessons Learned in Monitoring Fund Projects

Trust Fund projects are relatively small compared to other Bank operations (currently up to \$80,000 maximum in the Call for Proposals process), therefore, the methodology for assessing completed projects has been adapted to the size and type of intervention and the objectives set out in each Technical Cooperation.

¹ The Social Inclusion Trust Fund's Research Framework seeks to make efficient use of the Fund's limited resources for research by concentrating on those areas in which the Bank stands to achieve a greater impact with social inclusion operations and the policy and program design support provided to governments of the region.

In fact, Fund monitoring has served two purposes: (i) to track disbursements and pipeline status of approved Trust Fund projects throughout implementation; and (ii) to monitor and assess the performance of completed or near completed projects as an input to both the Fund and the wider Bank's social inclusion agenda.

The Fund has learned that monitoring of this sort has an important dissemination² and outreach function, as well as the potential to explore synergies between Fund's projects and Bank loans in execution.

The purpose specifically includes: the improvement of *buy-in in Fund products* both within the Bank and the relevant government agencies and/or civil society organizations; assistance in the *identification of lessons learned* both from the implementation of Fund operations, and from the studies/research sponsored by the Fund; and contribution to the *Fund dissemination strategy* both within the Bank and the region. Through this mechanism, the Fund pays special attention to participation of relevant civil society organizations and the potential contribution of Fund products to their political mobilization initiatives and opportunities for voice. In this process, the Bank is learning from and sharing in the experiences of teams as they execute their projects.

The Challenges of Measuring Effectiveness

In developing the Fund's internal effectiveness mechanism, special indicators were identified to measure the impact of the Fund. From the beginning, the Fund set out to ensure that there were well developed, highly competitive proposals that represent the diversity among Bank units and sectors, as well as full representation of targeted beneficiary groups in approved projects.

During the first two calls for proposals there was a significant focus on organizational strengthening and raising awareness in the promotion of social inclusion initiatives in the region. Comparing the data from Diagram 1.1, it is clear that initially 40% of Fund support in the first year of operation was focused on building support in these areas. By the third round of proposals, the Fund, in response to feedback from donors and specialists within the Bank, placed a priority on support to Bank Operations assuring that new proposals submitted to the Fund took into consideration the potential impact on the Bank's current pipeline.

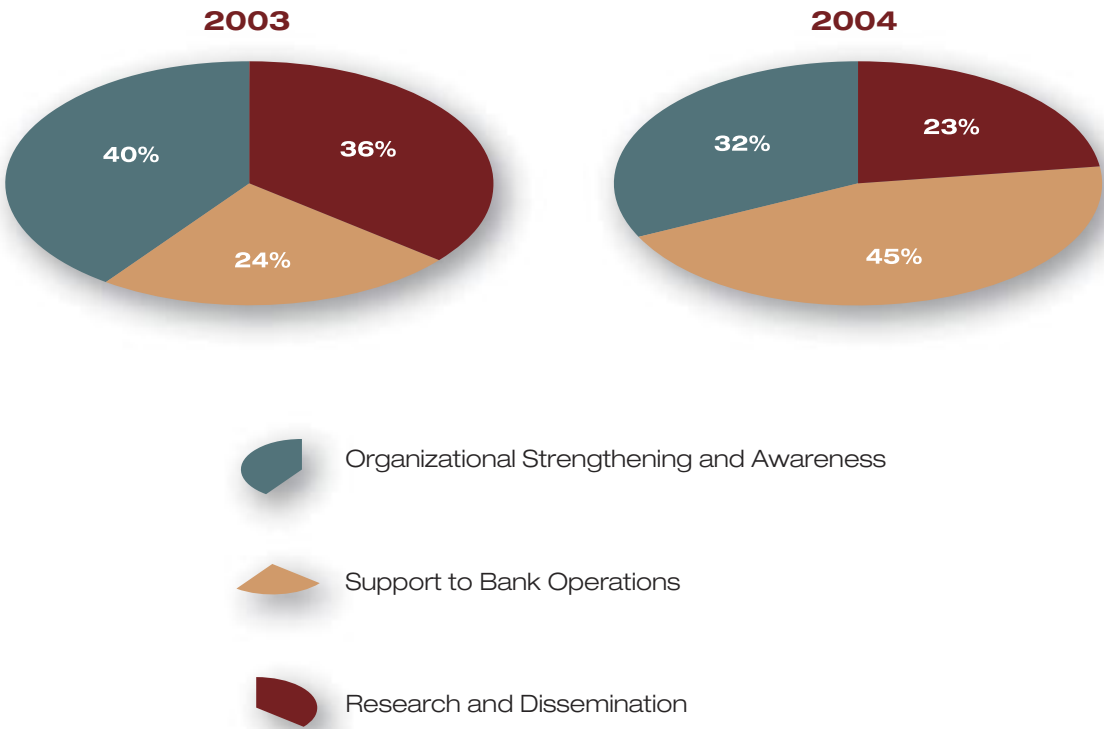
During the third call for proposals, special efforts were made to encourage a wider range of proposals from sector Specialists/Units working in areas other than social programs. In order to increase the responsiveness of Bank Specialists on social inclusion issues, the Fund Secretariat met with a variety of project team leaders, both at Headquarters and in the Country Offices to provide technical guidance on the development of proposals in

² The Dissemination Strategy promotes increased awareness of the Fund's activities and sensitization of Bank staff on social inclusion issues; and disseminates information on lessons learned from social inclusion projects via activities, publications, and direct contact.

new areas, such as environmental preservation, private sector and entrepreneurial development, modernization of the state and cultural development, to ensure that proposals effectively addressed relevant regional and national exclusion issues and focused on traditionally excluded groups. A comparison of the projects approved in 2003 with those approved in 2004 revealed an increase of 20% in the number of proposals submitted for non-social sector type activities.

Measuring effectiveness over a short period of time, however, remains a substantial challenge for the Fund. Although the Fund has excelled at promoting the need for projects submitted by sectors in the Bank that have a social focus, only a limited number of projects have been awarded to project teams that do not focus on social issues. In order to achieve a critical mass of projects in these non-traditional areas, the Fund must strengthen outreach to these sectors of the Bank and design innovative awareness-raising seminars, available to specialists in Headquarters and in Country Offices, with a specific focus on these areas.

Diagram 1.1 Percentage of Total Financing by Fund Area





To facilitate the process of measuring the Fund's effectiveness overall, the Fund developed basic indicators which are divided into: (i) *impact indicators*, which demonstrate the effect of the Fund's investment or activity; and (ii) *process indicators*, which measure how efficient the Fund is being administered. This information is compiled and used to make adjustments in the focus of the Fund as needed in order to obtain desired results.

In addition to The Fund's impact and process indicators, feedback from team leaders over the past three years has been invaluable in providing technical assistance, good practice models and lessons learned. The Fund has used the experiences and recommendations made by operational specialists in this sense to assist in gauging the impact of Fund initiatives on the ground throughout the region. In this process, the Fund has learned to value and gather results-oriented documentation or "success stories" which describe more effectively the nuances in the added value of the Fund's work and social inclusion initiatives on Bank operations³.

³ See Box on page 9.

SITF—Experiences in Social Inclusion

In an effort to record the impact of the Social Inclusion Trust Fund's work on National Processes, Bank Policies and Programs and on Bank Specialists themselves and in the interest of preserving institutional memory about Fund operations and relationship within the Bank, the following stories are excerpts from larger submissions made by Operational and Social Development Specialists. The contributors have shown and continue to express much more than a superficial interest in promoting social inclusion in the Bank and in the region.

Advancing Equity & Racial Inclusion

In April 2005, the Bank along with several other donor agencies hosted a Regional Policy Dialogue on Affirmative Action in Brazil. At this dialogue, participants from around the world exchanged ideas on the policy and practice of Affirmative Action. The meeting was an unqualified success for many reasons. First, the process itself was a success. This conference allowed donors to work in a collaborative way that could be considered a model for the way agencies can join forces to develop communities of practice among donor agencies. Another success was the rousing debate on Access to Justice, which resulted in Canadian NGOs committing to work with the officials from the Judicial Institute in the US, to develop a proposal to support judicial education on discrimination in LAC.

The role of the Social Inclusion Trust Fund in supporting the participation of regional voices both from the African descendant communities as well as from public policy agencies was critical to the success of this regional dialogue. The diversity of perspectives enriched the dialogue in a variety of ways. It is hoped that the SITF will continue to support knowledge exchange through research and dissemination processes such as the Regional Dialogue. Advancing inclusion requires advancing knowledge and new paradigms about the way things are. Advancing new paradigms requires that we advance dialogue across the fault lines of inequity.

Indigenous Peoples

The support of the Social Inclusion Trust Fund to SDS/IND has been crucial in the elaboration of the Strategy for Indigenous Development and the Operative Policy on Indigenous Peoples. Its financing made the Consulting Process possible in the different phases of preparation of the documents with governments, indigenous organizations, agencies, NGOs, and civic society in general of the borrower countries. This process constituted the major source of inputs for the documents' contents, in which applicability and implementation will signify a huge qualitative step in terms of the social impacts of the Bank operations. Equally important is the support that the Social Inclusion Trust Fund has given to the Technical Operation oriented in developing a Census, a Socio-Cultural Analysis of Indigenous Ambulatory Vendors in Quito, and the Identification of Financial Alternatives. The results of this initiative in progress will generate key lessons for this Bank on issues of poverty reduction and indigenous entrepreneurship in urban areas.



CALLS FOR PROPOSALS 2003-2005

Over the past three years the Fund has successfully completed three calls for proposals resulting in the approval of 26 projects, totaling over US\$1,400,000. Initially, the Fund turned its attention to the development and strengthening of internal guidance policies. The Fund also concentrated on the racial and ethnic components of social inclusion and accompanied the Bank process of writing and publishing the Bank's Action Plan for Combating Discrimination Based on Race and Ethnic Background.⁴

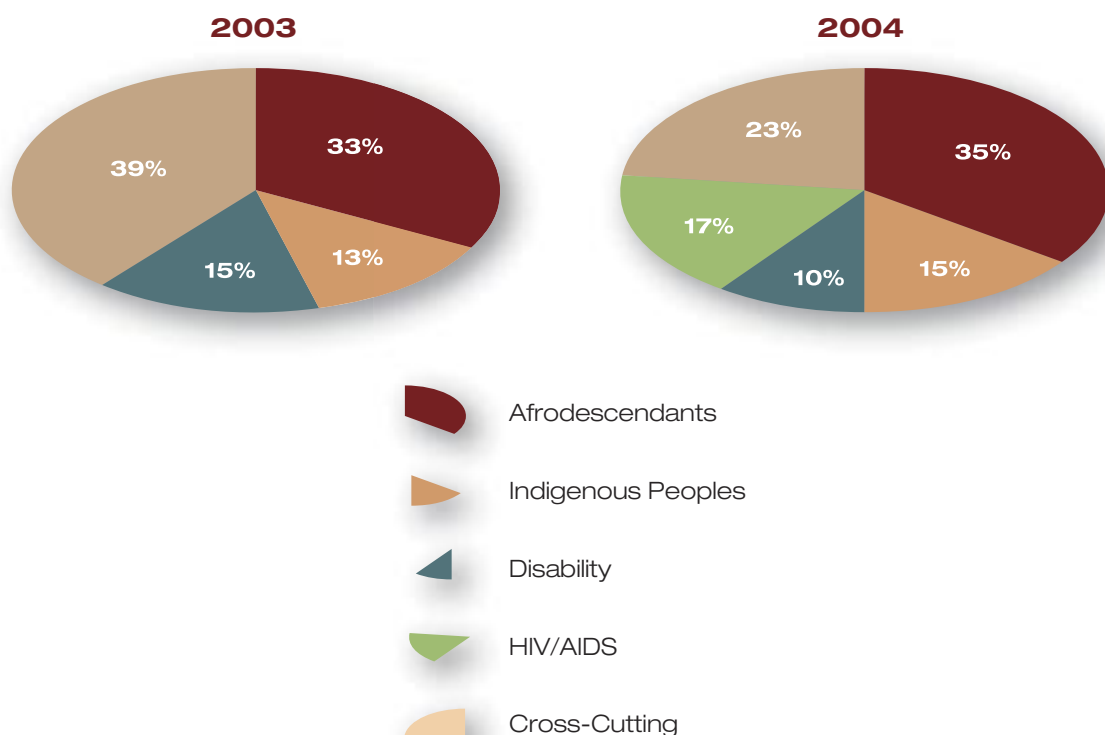
During the first year of Fund operation, the Bank expanded the definition of Social Inclusion to include other groups that suffer exclusion based on disabilities and the stigma around HIV/AIDS. Between 2003 and 2004, the Fund noted a sharp increase in the number of projects that address the stigma of HIV/AIDS and inclusion. Further analysis of the Fund's internal pipeline shows that most of the projects presented include cumulative disadvantages among other exclusionary issues where issues such as the stigma of HIV/AIDS, gender, and ethnic or racial identity intersect. The metric data above (Diagram 1.2) demonstrates that with heightened awareness of the collateral effect of multiple exclusion factors, the approval of cross-cutting initiatives, increased in 2004. The increase in both HIV/AIDS and cross-cutting initiatives may be closely related to increased outreach conducted by the Fund to raise the awareness at both headquarters and in the region on these issues.

The Fund witnessed growth in 2005 in the number of potential team leaders who seek technical assistance to design projects based on recommendations from other Bank specialists. The Fund has also noted an increase in requests for knowledge products or tool kits provided by the Fund Secretariat and members of the Technical Committee. These efforts are creating greater formal and informal opportunities for coordination across regions on this thematic issue. It is commonplace that operational specialists from one region share their tools with one another while evaluating projects for the Fund's call for proposals process.

Coordination at all levels contributes to the Fund's goal of better integrating social inclusion issues into IDB operations and programming. In this way the Fund collaborates with other Trust Funds in the Bank to obtain support for the high quality proposals received in the competitive call for proposals process. High-ranking proposals that do not receive financing through the Fund are strategically forwarded to other Trust Funds within the Bank. The Fund also engages with other Trust Funds to encourage project teams and Country Offices to continue to work together to promote social inclusion in project design and implementation outside of the Fund's call for proposals process. The Fund coordinates activities with and regularly contributes to the project selection process of the ENLACE fund (supported by DFID) which broadly addresses social inclusion in region three at the IDB (Central America and the Caribbean). The Fund has also worked in tandem with the Japan Poverty Fund and the Japan Program in an attempt to facilitate

⁴ <http://idbdocs.iadb.org/wsdocs/getdocument.aspx?docnum=356397>

Diagram 1.2 Percentage of Total Financing by Beneficiary Group (Comparative View)



the work of Bank Specialists working on poverty, inequality and exclusion issues. These efforts have allowed the Fund to mainstream social inclusion proposals; share lessons learned and maintain productive coordination with other Trust Funds in the Bank.

Special Initiatives

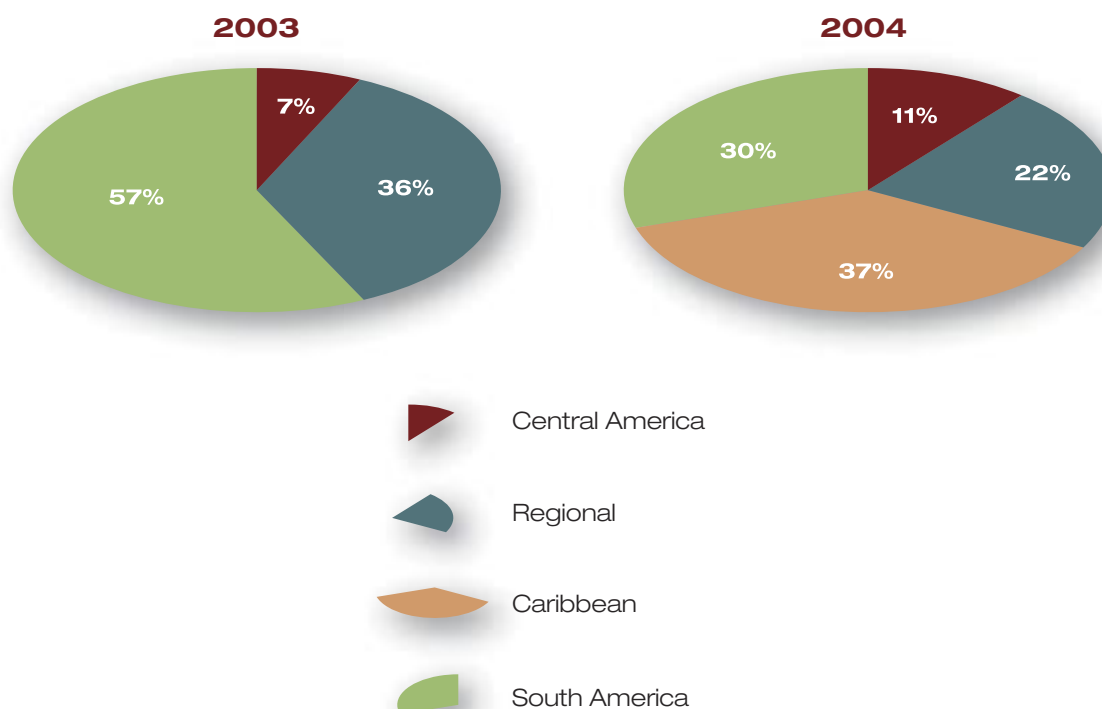
In an effort to strategically target issues, that can exacerbate the impact of social exclusion on specific groups in the region, the Fund launched four special initiatives between 2004 and 2005:

NGO Innovation Awards/Travel Grants

These initiatives were launched to aid in the promotion of awareness-raising and capacity building, which assisted in building the internal and organizational capacities of regional, national, local and community-based organizations and conduct policy dialogues.

The New Voices Travel Grant policy served to support the participation of excluded population group leaders to activities and events relevant to the promotion of a social inclusion agenda in the region. The term "new voices" referred to NGO leaders who had

**Diagram 1.3 Percentage of Total Financing by Sub-Region
(Comparative View)**



not received previous IDB funding to travel or who did not usually participate in events organized by the international community. Small grants were provided to support travel of NGO representatives from Colombia, Ecuador, Guatemala, Panama, and Peru in an effort to promote input from Fund target groups regarding good practices in local economic development in Afro-descendant communities in Latin America and the Caribbean.

The NGO innovation awards recognized three distinguished NGOs dedicated to the promotion of equality. In honor of their innovation in this area, the Fund provided a small grant to each organization at a special ceremony held in Mexico City during the International Forum on Anti-Discriminatory legislation organized by the IDB in 2004. This initiative allowed the Bank to highlight the importance of grassroots initiatives to combat discrimination and promote social inclusion in the execution of projects in the region.

Results: *Activities like the awards ceremony have contributed to the dissemination of innovative practices in social inclusion. The event also raised the profile of organizations that are serving as a valuable resource for best practices at the local, national, and regional levels.*

Rights-Based Initiative

In 2004, the concept was launched with earmarked support from the Fund's donors. The Rights-Based Initiative consists of two subprojects:

1. Direct support for Indigenous Strategy Development; and
2. Advancing Economic and Social Rights-Based Development.

The first project sought to support the development of an indigenous strategy and policy to guide the IDB in its activities related to indigenous peoples for the next decade. In this process resources were earmarked to engage indigenous organizations and their representatives in a consultation process to ensure their direct input into the drafting of the strategy and its future implementation. These organizations then provided technical expertise to review lessons learned from past experiences with strategies and projects involving indigenous peoples by the IDB and other development institutions.

Results: *Though the impact of this initiative is still being measured, it is clear that the wide array of input from indigenous organizations has resulted in a comprehensive draft of the strategy that the Bank through the advocacy efforts of SDS/IND (Indigenous Peoples and Community Development Unit) expects to be approved in 2006.⁵*

The second project aimed at promoting knowledge of the concept of rights based development –RBD- in Latin America, and assessing its applicability and value added to tackle inequality. The initiative started with the establishment of a Working Group on Rights and Development, comprised by ECLAC, DFID and the World Bank, which served as platform of discussion on the issue and planning of joint activities. The group agreed to commission studies to: 1) flesh out the concept of RBD; 2) to analyze the region's tradition/history in terms of rights; and 3) to assess how a different approach to development could contribute to fill out gaps in terms of inequality of the so-called Washington Consensus. These studies served to frame the discussion of the first seminar on rights and development organized by the IDB, which was held in ECLAC Headquarters in December 2004. Participants confirmed that, by resting on the international framework of human rights, the concept of RBD offers a wider perspective on addressing poverty and exclusion. This approach also diminishes legalistic and corporatist traditions and creates corresponding obligations and responsibilities on the part of citizens and states.

Santiago called for the identification of cases in the region incorporating rights at the national/policy level, as well as policy areas to "ground" the concept. Carrying out a forum with economists to identify issues and obstacles to incorporating rights perspectives and "widen the circle" was also recommended. To disseminate the results of this meeting, the Fund published a special Social Development newsletter on rights and development in May 2005, which presented summaries of the background studies prepared for this conference, and its conclusions/recommendations.

⁵ This initiative is recognized as the IDB *Strategic Framework on Indigenous Development and Operational Policy for Indigenous Peoples*.



In order to comply with the mandates from Santiago, the Fund provided funds to ECLAC to commission a study of Chile's recent health reform, which conceptualizes health as a right (explicit guarantee) and establishes strong enforcement mechanisms to ensure health for all. Additionally, it identified the issue of registration and documentation as an area related to RBA (e.g., the right to identity, to obtain identification, which in turn guarantees access to social services and other rights), which could become operational. Complementing existing initiatives of the Bank in this area, the Fund carried out a consultancy to identify different interventions implemented in the region to promote registration.

Results: *Despite challenges related to the lack of knowledge of the concept of rights based development, and documented resistance of development economists to issues of human rights, this special initiative has been instrumental in enriching the inequality debate in the region, and making the case for more comprehensive approaches to poverty. The series of dialogues and research generated have been able to present rights as an intrinsic element of development agendas, which are not at odds with economic growth.*

Special Line of Activity —Chile

The Bank has been working with Chile on issues of social inclusion of indigenous peoples and women, before the existence of the Fund. The Fund, however, has played a fundamental role in the promotion of issues of disabilities in the Bank's dialogue with the country. Thanks to the Fund's existence, SO1 developed the idea of using the Special Line of Activity to study the legislative challenges that Chile faces on issues of disability, in order to prepare the Country Strategy Paper. In fact, Chile has been trying to consolidate a rights-based development approach, emphasizing the issue of equal opportunities. The country is trying to distance itself from a charity driven approach towards people with disabilities. For this purpose, there is a need to generate knowledge and raise awareness in the public sector and civic society. The TC financed by the Fund (US\$20,000) made it possible for the Bank to initiate the dialogue on disability with the country during the preparation process of the new strategy. It was agreed with FONADIS that it would make comparative legislative studies to identify the lines of public policy that would consolidate the rights-based approach.

Special Line of Activity to Support Country Strategy Papers and Poverty Assessments⁶
At the request of the Fund's donors and to increase the strategic objectives of the Fund in its third year, a special line of activity was established to address social exclusion issues in IDB Country Papers and Poverty Assessments began in March, 2005. This special line of activity, which includes technical support from the Fund Secretariat, was developed based on the significant input of Bank Country Coordinators, the Bank's Poverty Division of the Sustainable Development Department and Operations Specialists. The end result took into consideration the kind of support the Fund could provide to best support the incorporation of social inclusion dimensions/analyses in these policy documents (e.g., instruments needed, timing with the Bank cycle, and coordination with other financing sources).

In 2005, the Fund focused on providing enhanced support for initiatives that would speed up the process of integration of social inclusion in bank programming and operations. It was also important that any new initiatives provide a longer-term approach to weaving social inclusion into the future loan process and dialogue with government officials. By improving the analytical content and social inclusion considerations of the Country Strategy Papers the Fund expects to reach a wider range of Bank and national programs and policies thus contributing to efforts to frame more systematic considerations of social inclusion in the cycles of Bank project development.

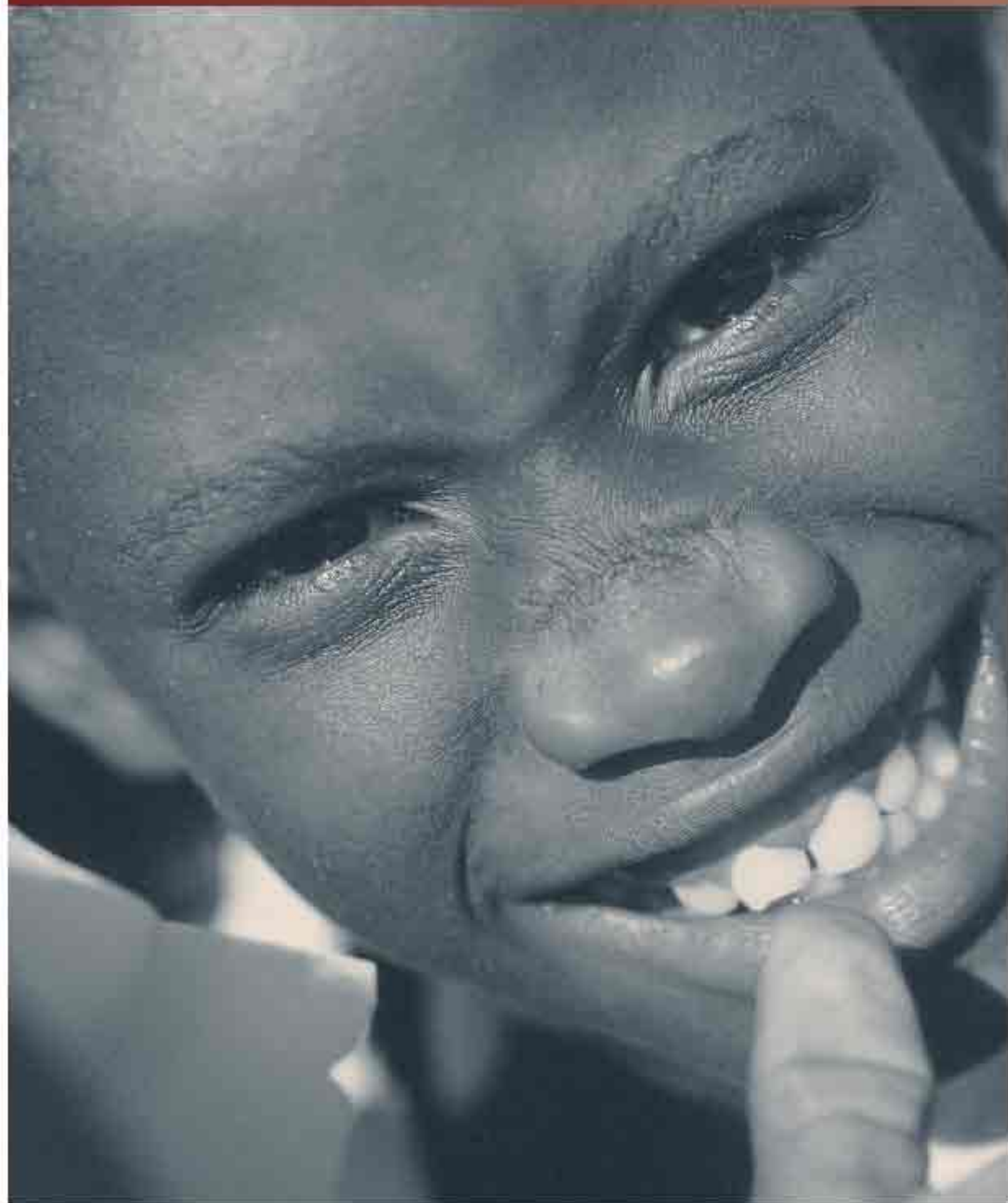
⁶ See Annex 2 and 3 for more detail or refer to http://www.iadb.org/sds/SOC/site_6277_c.htm for more information and guidelines for the Special Line of Activity.

Though the Special Line initiative is in its initial stages, three projects submitted by country strategy teams were approved in 2005 and by the end of the year the funds were exhausted. The Fund expects that the small Technical Cooperations (currently \$20,000 maximum) have the potential to make a significant impact on the drafting process for programming documents over time.

This special initiative employs an innovative approach that allows for a broader learning experience on the part of the potential project team. Input from peers in the Technical Committee⁷ during the evaluation process, which includes a virtual “reformulation” mechanism, which often involves sharing lessons learned with the project team. The role of the Fund Secretariat has also been fundamental in stimulating interest among team leaders and providing technical support.

Expected Results: *It is still very early to measure the results of the projects approved under this initiative. By comparing Country Strategy Papers from previous years to those written after receiving support to provide additional information on social exclusion the Fund will be able to see the impact this initiative has had in the process. As an additional method of evaluating the efficacy of the initiative the Fund will examine the number of references to groups or particular issues faced by excluded groups in the final paper. On a number of levels, this process has the potential to yield lasting results by building the capacity of Bank staff to incorporate new ideas on social inclusion in the prime documents for development strategies.*

⁷ See Annex 3 for detailed listing of Technical Committee Members 2005–2006.



PROGRESS REPORT ON FUND PROJECTS

In December 2005, the Fund witnessed the completion of eight Fund projects.⁸ Most of the initiatives have been research oriented, such as those addressing the extent to which race is a factor of exclusion in sectors such as education and health. Results from both of these studies have been disseminated via technical workshops and shared with relevant databases and other Bank outlets.

A series of training sessions targeting African descendant and indigenous peoples on data collection and analysis conducted by MECOVI are completed, and the evaluation report will be ready in early 2006. The Fund Secretariat is gathering information from training participants to measure the levels in which the tools produced are applied. This additional information will help the Fund identify the ways in which the Bank could support future initiatives in the area of data collection and analysis. Other Fund supported efforts to collect and analyze data with a focus on people with disabilities have concluded in Southern Cone countries and this information is currently contributing to the debate on how disability is defined in that region.

In terms of outreach, the Fund project supporting the development of the Bank's social inclusion awareness campaign is nearly completed. Given that Fund resources were primarily invested in conducting focus groups and identifying key issues and messages, the Fund Secretariat supported the Bank's External Relations Department (EXR) in accessing complimentary funds for the implementation of the campaign, including production of materials. As a result, the ENLACE Fund has granted funds to carry out the campaign in Central America. Fund Secretariat will continue supporting the implementation of the campaign via technical support, and ensuring coordination with other Fund projects (e.g., ensuring use of Fund products as input for the campaign.) In support of operations, the Fund Secretariat continues to coordinate with the project team working on the design of a loan to support Nicaragua's census process (see Box 3), in order to ensure implementation of methodology enabling participation of excluded groups in the census process. Another project to be completed by the end of the year provided support for the CONPES process in Colombia. This TC has not only contributed to greater institutional coordination between relevant agencies, but it has also served as the stimulus for a series of meetings between Afro-Colombian leaders and Washington officials.

The effective leadership of the Country Office in Ecuador has been vital to increasing not just attention to excluded groups, but to ensuring consistency, continuity, and sustainability of Bank initiatives. In fact, these qualities have made Ecuador a country worthy of assuming "leading country" status in terms of national processes toward social inclusion. The project team preparing the Country Strategy Paper for Ecuador submitted a proposal to the Special Line of Activity to build on the momentum created by the pilot initiatives mentioned above to ensure the effective integration of social inclusion in the final document.

⁸ The Fund is expecting the final completion reports from Project Team Leaders.



Two out of three Technical Cooperations granted to Ecuador's country office have also concluded at the end of 2005. It is worth highlighting that both these projects were distinctly innovative. The first project, which focused on providing training for social management to fifteen NGOs, was partly executed by an Afro Ecuadorian NGO; and the second, which was originally meant to conduct a census on indigenous street vendors in Quito, ended up supporting an indigenous entrepreneurship project in Ecuador's capital suburbs. When both initiatives initially supported by the Fund revealed that they are seeking additional financing for implementation of next steps, the Fund took this as an indicator of growing demand for social inclusion efforts in Ecuador. The projects plan to put into practice the proposals prepared by the NGOs during the series of training and build a commercial mall on a special parcel of land ceded to an indigenous association by the Mayor of Quito. The efforts of the organizations in advancing the implementation of these initiatives are demonstrating how the Fund's support can have a catalytic effect at the local and national levels.

NICARAGUA: A Case Study

This technical cooperation not only directly supported a key element of a loan operation, but also had planned for wider implications and impacts through a series of external and internal events, all made possible by networking and sharing information.

One of the principal areas for mainstreaming social inclusion in IDB financed loans is by strengthening basic data collection, and in 2000 and 2002 the IDB co-hosted international conferences on improving data collection and enhancing the participation of indigenous people and Afro-descendants.

When the IDB was in the designing stages of NI-0180, Strengthening of the National Statistics System (INEC) and Support for the National 2005 Census, the Government of Nicaragua requested technical support to improve the census questionnaire with pertinent and culturally acceptable questions on ethnicity, as a direct result of their participation in the two aforementioned conferences.

With financing from the SI Fund, a consultant was hired to work with INEC and develop the questionnaire in collaboration and consultation with the ethnic groups in Nicaragua. We were able to do this prior to the pilot census in March of 2004, which permitted INEC to make the necessary adjustments to the questions, and carry out the census as planned in March 2005. Furthermore, there were additional spin-offs as a result of the networking the Bank is doing through the Inter-Agency Consultation on Race and Ethnicity.

DFID took an interest in the project and provided consultation qualified statistician from UK, and later decided to support the social communication campaign. With the support of the sector specialist in the IDB's country office, a donor coordination committee was established to support INEC's work in the Ministry of the Presidency.

Lessons learned from this technical cooperation have been shared with colleagues who are working on census projects in other regions.



PROJECT SUPPORT 2003-2005⁹

The Fund has financed over 26 projects in the call for proposals process, five projects linked to rights-based initiatives and three proposals in direct support of the Country Paper process through the Special Line of Activity. In addition to these projects, support in the form of technical assistance and recognition of the importance of the role of civil society in shaping the social inclusion agenda is making an invaluable contribution towards reaching the goals set by the Fund in 2003. The investment made through the Fund is more than just the sum of dollars committed to promoting a social inclusion agenda. For the groups targeted by this initiative, the Bank specialists working in the regions and national policymakers, these projects will assist in developing the support needed on numerous levels to bring about a change in the ways in which development projects are conceived of and executed in the future.

Country	Title	Activity Type ¹⁰	Amount
Round 1			
Brazil	Afro-Brazilian Observatory	OS	\$80,000
Brazil & Span. Speaking Countries	Training Courses on the Design and Analysis of Household Surveys	SBO; RES	\$80,000
Brazil, Colombia, Guyana, Mexico, Trinidad & Tobago	Race and Ethnic Inequalities in Health & Health Care in LAC	RES; SBO	\$70,000
Ecuador	Support for Afro-Ecuadorian Organizational Strengthening	OS; SBO	\$80,000
Nicaragua	Development of a Methodology to foster the participation of ethnic groups in the 2005 Census of Nicaragua	SBO; OS	\$43,000
Regional	Design and Development of the IDB Social Inclusion Awareness Campaign	OS	\$80,000

⁹ The Fund can provide a detailed financial statement generated by the IDB upon request.

¹⁰ SBO—Support to Bank Operation RES—Research and Dissemination OS—Organizational Strengthening and Awareness raising

PROJECT SUPPORT 2003-2005 (cont.)

Country	Title	Activity Type ¹⁰	Amount
Round 2			
Brazil	Support for Participatory Formulation of Pub Policies that protect the rights of indigenous peoples	OS	\$50,000
Brazil	Strengthening of social inclusion organizations for Afro-descendants, women and persons with disabilities	OS	\$51,601
Brazil	Seminar on Challenges in Higher Education for Indigenous Peoples	SBO	\$15,000
Colombia	Support to the Afro-Colombian community for participation, inclusion and transparency in social investment	SBO; RES	\$70,000
Ecuador	Census and socio-cultural analysis of indigenous street vendors in Quito	RES	\$50,000
Mercosur + Bolivia & Chile	Improving Disability Data in the Southern Cone	RES	\$48,000
Regional	Social Exclusion in Education in Latin America and the Caribbean	RES; SBO	\$56,000
Regional	Study on Social Exclusion of institutionalized mentally and physically disabled persons in Latin America and the Caribbean	RES	\$80,000
Round 3			
Bahamas	Participatory process to develop an inclusion policy in Bahamas	SBO; RES	\$67,265
Bolivia	Structuring of a pilot project for community land management for indigenous communities in the Bolivian Altiplano	SBO; OS	\$20,000
Colombia	Diagnostic Study on the Situation of HIV/AIDS—Atlantic Dept—Colombia.	RES	\$55,000

Country	Title	Activity Type ¹⁰	Amount
Ecuador	Sistema de Indicadores Sociales del Pueblo afroecuatoriano (SISPAE)	SBO	\$40,000
Guyana	Poverty Assessment of Vulnerable Populations in Guyana 2005	SBO; RES	\$70,000
Jamaica	Gender Sensitization in HIV/AIDS Prevention and Mitigation: Transfer the experience of women with HIV/AIDS into prevention strategies	OS	\$44,000
Jamaica	Enhancement of NGO Documentation and Resource Centre to Facilitate Access by the Disabled Community	OS	\$30,000
Panama	Fortalecimiento Institucional— Dirección Nacional de Política Indigenista (DNPI)	SBO; OS	\$65,000
Uruguay	Dissemination of information and Sensitization on the situation of Afro-Uruguayan groups through the instrument “Afro-descendant Guide for Latin America and the Caribbean”	OS	\$55,000
Regional	Affirmative and Positive Action in Latin America: Case Studies and Presentations for the IDB Seminal on Equity and Social Inclusion.	RES	\$42,000
Regional	Improving Disability Data in the Andean Region and Caribbean	RES	\$25,000
Regional	Early Education Opportunities for Indigenous and Afro-descendent Children in Latin America (Peru, Venezuela, Ecuador)	RES; SBO	\$60,000
Total Calls for Proposals Rounds 1–3			\$1,426,866

PROJECT SUPPORT 2003-2005 (cont.)

Rights-Based Initiatives	
Support to Preparation and Consultation on the IDB's Strategic Framework on Indigenous Development and Operational Policy on Indigenous Peoples Development	\$148,300
Consultation Process – Strategic Framework for Indigenous Development	\$75,321
Research Framework and Support to the Inter-Agencies Group: Rights Based Development	\$107,000
Technical Meeting on Rights-Based Development in LA	\$79,100
Rights-Based Development in Latin America: Case Studies and Forums for Economists	\$136,500
Total 2004–2005	\$546,221
Special Line of Activity	
Development of a Policy Note on Indigenous Peoples in Suriname	\$20,000
Challenges in the legislation and policies on people with Disabilities in Chile	\$20,000
Technical Note on Ethnic Groups and Social Exclusion in Peru	\$20,000
Total	\$60,000
New Voices Initiative/NGO Awards	
Conference Millennium Development Goals: Race and Ethnicity	\$50,000
NGO Awards and Support for Social Inclusion Trust Fund Activities	\$85,000
Total	\$135,000



Technical, Advisory and Logistical Support—Social Inclusion Trust Fund	
Social Inclusion Trust Fund: Operational Development	\$150,000
Lessons Learned on Social Inclusion	\$88,000
Technical and Advisory Support to Social Inclusion Trust Fund	\$130,000
Technical Support to Social Inclusion Trust Fund (2nd Year)	\$110,000
Social Inclusion Trust Fund: Operations Monitoring and Evaluation Support	\$50,000
Technical, Advisory, Admin and logistic support Social Inclusion Trust Fund	\$98,000
Total 2003-2005	\$626,000
Grand Total—All Related Expenses	\$2,794,087

RAISING AWARENESS/LEARNING FROM EXPERIENCES IN THE REGION

Within the IDB, the Social Inclusion Trust Fund serves not only as a source of financing for targeted initiatives on social inclusion, but also as a catalyst for convening information sessions and providing pertinent lessons in executing social inclusion initiatives which provides an inside track for Bank specialists and policymakers. In partnership with or in support of SDS/SOC's knowledge production initiatives, the Fund is providing technical support for the Bank in this area.

The work of the Fund complements and gives added impetus to the Bank's work in favor of excluded groups in the region. In 2005, the Fund supported the following activities:

Social Inclusion Trust Fund Events in Collaboration with Bank Units		
Social Inclusion Learning Event SDS/SOC	July 6, 2005	SDS/SOC organized a meeting with Operations Specialists from the IDB regional departments to share lessons learned on making social inclusion an operational concept, including discussions on a broader concept of Social Inclusion.
Social Sectors: Health, Education and New Initiatives	July 14, 2005	Fund Presentation on the Social Inclusion Trust Fund for Consulting Firms primarily from the United States and Europe.
Promoting Racial-Ethnic Diversity in Education	October 3, 2005	Roundtable discussion with participants (both internal and external to the Bank) and the Coordinator of Diversity and Educational Inclusion in the Brazilian Ministry of Education. The program focused on the unique opportunities and challenges of implementing a comprehensive educational inclusion policy in Brazil.
Special Presentation—The Role of National and Regional Instruments and Mechanisms for the Promotion of Social Inclusion	October 1, 2005	Dialogue with Brazilian Vice-Minister of Racial Equality and Organization of American States Chairperson for the Working Group to elaborate the Inter-American Convention on Racial Discrimination and other forms of Intolerance. Included updates on Santiago +5 and the new Special Rapporteur on People of African Descent in the Americas for the Inter-American Commission for Human Rights.
Social Development Week	October 24-27, 2005	Bank-wide conference on social development. Fund supported the conference throughout and provided information for the public about social inclusion and the impact of exclusion on people of African descent in Latin America.
Public Policy Dialogues on Exclusion based on Race or Ethnicity	April 14-16 2005	The Fund supported the International Seminar on Advancing Equity and Racial Equality in Brasilia, which was co-sponsored by the Brazilian Secretariat for the Promotion of Policies on Racial Equality (SEPPIR), and the ILO (See Box 1).
Race and Ethnic Inequalities in Health & Health Care in LAC	April 15, 2005	IDB seminar financed by the Fund on health and inequality related to race and ethnicity organized in Washington, D.C. to discuss the findings of the research papers with Bank



Social Inclusion Trust Fund Events in Collaboration with Bank Units

Social Exclusion in Education in Latin America and the Caribbean	Publication: October 2005	The Fund financed this research activity focused on establishing a quantitative and qualitative accounting and profiling of social exclusion in education. This detailed analysis of social exclusion in education in the region (and the contextualization of data and indicators that empirically profile the nature and magnitude of this and related phenomena) is the first of its kind for the Bank and will provide an important framework for future research, Bank operations and policy-making in the region. Data from this Fund operation will serve as key input in the new Bank's social indicators database EQxIS, which was launched by the Bank's Poverty Unit in the context of the Social Development Week on October 24-27.
Rights Based Approach to Development	Publication: November 2005	SDS/SOC published a special newsletter on rights and development with support from the Social Inclusion Trust Fund Secretariat. The newsletter presented summaries of the background studies, key findings, conclusions and recommendations from the Santiago seminar on rights held in December 2004.



FINAL REMARKS

Overall, the last three years of collaboration through the Fund have strengthened the efforts of the IDB to promote social inclusion in its policies and strategies, in addition to providing support for on-going efforts to:

1. Support to Bank Operations

Given the potential long-term impact of the Special Line of Activity on IDB operations and the opportunity this initiative offers to support national processes over time, it would be important to consider renewal of reserved Funds for this initiative. Based on the internal evaluation of lessons learned, in consultation with the project team leaders and others involved in the Special Line of Activity approval process, the Fund Secretariat is making appropriate adjustments to the procedures to reflect an easier, streamlined approach to supporting these proposals.

2. Raising Awareness and Strengthening Outreach

Though the number of Country Offices seeking technical assistance or presenting projects to the Fund has grown, tackling social inclusion within the Bank structure is still in its initial stages. At this time, there are a number of suggestions presented to the Fund by Bank specialists who want to address the incorporation of inclusive concepts in programming and staffing and discuss internal incentives for monitoring small TCs from the Social Inclusion Trust Fund. These are issues that with time the IDB can address. At present, however, the Fund's unique function allows for some trial runs of innovative ideas before they are implemented on a wider scale.

3. Research New Areas and Disseminate Findings

The importance of research cannot be underestimated as we move forward with this initiative. The groups targeted by the Fund are those that lack data that better describes their condition, thus making it challenging to design and implement Bank pipeline projects that take their needs into consideration. Information drives both the first and third methods of achieving the Fund's objectives by providing or compiling needed information that may not otherwise be available to Bank project teams.

Inasmuch as stakeholders would like to greatly reduce the impact of social exclusion in the region or eliminate it altogether, the limited resources of this Fund can only attempt to satisfy the demand but may never completely meet the needs of the region in this respect. What the Fund has shown over the past three years is that a modest investment in promoting inclusion in the region can resonate widely. The Fund has played a central role in supporting the documentation of costs of exclusion and the benefits of social inclusion, raising awareness and strengthening the capacity of the Bank and its member countries in this area.

FINAL REMARKS (cont.)

Clearly increased opportunity and access to decision making among excluded groups and strengthened capacity to reduce levels of social exclusion for stakeholders at all levels will contribute to more effective development processes in Latin America and the Caribbean. Over the next three years, the Fund will use its foundation and experience to address the challenges of integrating social inclusion within the operations and policies of the Inter-American Development Bank. With continued support from the Royal Ministry of Foreign Affairs of Norway, and added support from potential donors, the Fund will be able to use the experience it has gained during its first phase of programming to increase strategic support where needed and assist in creating more inclusive practices within the Bank and greater opportunity for marginalized groups in the region.



ANNEX 1

**Summary of Special Line of Activity to Support Country Strategy
Papers and Poverty Assessments: March–December 2005**

COUNTRY	TITLE	OBJECTIVE	AMOUNT
Suriname	Development of a Policy Note on Indigenous Peoples	<ul style="list-style-type: none"> ◆ The policy note will provide a brief description and analysis of the issues regarding the current socio-economic and legal status of Indigenous peoples and Maroons. ◆ Provide policy recommendations to be discussed with the new authorities in the context of the Bank's dialogue with Government. ◆ This policy recommendation will be summarized in a Policy Matrix, providing a strategic focus for the Bank's activities in Suriname as they relate to these groups. 	\$20,000
Chile	Challenges in the legislation and policies on people with Disabilities in Chile	<ul style="list-style-type: none"> ◆ Develop studies on the challenges for the disabled in Chile in preparation for the Country Strategy Paper. ◆ Provide support for comparative legislative analysis, which allows for the identification of policies to consolidate a focus on rights. ◆ Identify alternative legislation which favors the insertion of people with disabilities in the work force. 	\$20,000
Peru	Technical Note on Ethnic Groups and Social Exclusion	<ul style="list-style-type: none"> ◆ Review the problem of exclusion faced by indigenous peoples, Afro-Peruvians, and rural workers. ◆ By preparing a technical note on the situation of ethnic groups (indigenous peoples and African descendants), that allows for identification of principle themes within exclusion and mechanisms that the Bank could contribute to their inclusion. ◆ Advance a series of consultations and focus groups, which identify government, and civil society perceptions of themes such as exclusion, discrimination, racism and expectations. 	\$20,000
Ecuador	Technical Note about Social Inclusion and the Afro-Ecuadorians	<ul style="list-style-type: none"> ◆ Reviews the diagnostic study on the situation of Afro Ecuadorians, published by the IDB in 2002, and update it accordingly. ◆ Produce a document with analysis of diagnostic poverty studies in Ecuador and identify existing public programs, loan programs and other existing international co operations that have the goal of promoting social inclusion for Afro-Ecuadorians ◆ Analyze the impact of these programs (IDB, WB, and others) and highlight the impact where possible making recommendations about how the Bank can better respond to their needs. 	Pending Certification

ANNEX 2

Calendar for Country Papers¹¹

(Updated December 2005)

Country ¹²	Status of Country Paper	Contact CP
Argentina	Approved 2004	Claudia Coulston
Barbados	In preparation	Desmond Thomas
Belize	Approved 2004	n.a.
Bolivia	Approved 2004	Gerhard Lair
Brasil	Approved 2004	Patricio Duarte
Chile	Started 2005	Cynthia Guimaraes
Colombia	Starts 2006	Luis Giorgio
Costa Rica	Starts 2006	n.a.
Dominican Republic	Approved 2005	Wolfgang Munar
Ecuador	Starts mid-2006	Luis Giorgio
El Salvador	Approved 2005	Rafael Rodriguez
Guatemala	Approved 2005	Héctor Morena
Guyana	n.a.	Iwan P. Sewberath
Haiti	In preparation	
Honduras	Starts 2006	Gina Montiel
Jamaica	In preparation	Dougal Martin
México	Starts 2006	Jose Juan Gomes
Nicaragua	Starts 2007	Luiz Zavaleta
Panamá	Approved 2005	Charles Smith
Paraguay	Approved 2004	Marilia Mirza
Perú	Starts 2006	David Rogers
Suriname	Started 2005	Carlos Elias
Trinidad	Approved 2004	Carlos Elias
Uruguay	In preparation	Marcelo Cabrol
Venezuela	Starts 2006	Humberto Gobitz

¹¹ Poverty Assessments at the IDB do not follow a regular calendar as is the case for Country Strategy Papers.

¹² Countries with shading have applied for Special Line of Activity and been approved by the Technical Committee, Ecuador proposal status is on hold pending further resources. For Guidelines see: http://www.iadb.org/sds/doc/Special_Line_of_Activity_for_Country_Papers.doc

ANNEX 3

Social Inclusion Trust Fund Technical Committee 2005-2006

Chairperson	Wanda Engel Aduan (from May 2005)
RE1 Representative	Carmen Albertos Marcia Arieira (Alternate) (from September 2005)
RE2 Representative	Maria Teresa Traverso Marie Gaarder (Alternate) (from September 2005)
RE3 Representative	Kristyna Bishop Jennelle Thompson (Alternate)
SDS/SOC Representative (rotating)	
Indigenous Peoples 2005	Carlos Viteri (From September 2005) Maria da Cunha (Alternate)
HIV/AIDS and Disabilities	Ernest Massiah
Race	Jacqueline Mazza
Gender in Development	Anna-Marie Urban
Non-voting Members	
RE2/TEC	Maria Bouroncle
Fund Technical Advisor	Zakiya Carr Johnson (from June 2005)



ACKNOWLEDGEMENTS

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The Fund would also like to acknowledge the invaluable guidance and support from SDS/SOC, the Bank's President and Vice-President's Offices, External Relations (EXR) and specialists both at Headquarters and in the Country Offices who have contributed in so many ways to this initiative. Additional thanks are extended to Stacy Richards-Kennedy for her gracious support during the transition.

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