

Review of  
***NGO-IDEAS***

**Survey of Partners from the  
Global South**

OPINIONS  
on UTILITY, EFFECTS and  
SUGGESTIONS FOR FOLLOW-UP

[www.ngo-ideas.net](http://www.ngo-ideas.net)

December 2011

**Report written by:**

**Martina Rithaa**  
P.O.Box 50655-00100  
Nairobi – Kenya  
[mrithaa@yahoo.de](mailto:mrithaa@yahoo.de)

## CONTENTS

EXECUTIVE SUMMARY .....	3
INTRODUCTION .....	5
1. GENERAL INFORMATION ABOUT THE NGO-IDEAs PARTNER NGOs .....	5
2. THE UTILISATION OF NGO-IDEAs TOOLS BY PARTNERS IN NUMBERS .....	6
3. UTILITY AND EFFECTS OF THE NGO-IDEAs APPROACH .....	7
3.1 Utility and Effects on the Partner NGO .....	7
3.2 Utility and Effect on the Community Based Organisation (CBOs) .....	11
3.3 Utility and Effects on South Indian Partners, participating in NGO-IDEAs since 2004 .....	13
4. LESSONS LEARNT .....	15
4.1 Why we have moved.....	15
4.2 What we still need to overcome .....	16
5. SUGGESTIONS FOR FOLLOW-UP .....	17
5.1 Follow-up by the Funding Partner .....	17
5.2 Follow-up by the Partners in the Global South.....	17
5.3 Follow-up to the Groups / CBOs .....	18
6. SUMMARY AND LINKING THE RESULTS .....	19
Annex 1: Questionnaire survey Partners from the Global South. ....	21
Annex 2: Evaluation of open ended questions.....	27
Annex 3: Tables presenting detailed evaluation of the scoring responses. ....	39
Annex 4: Publications .....	41
GRAPHS	
Graph 1: Utility and Effects on the Partner NGOs (Part 1). ....	7
Graph 2: Utility and Effects on the Partner NGOs (Part 2). ....	9
Graph 3: Utility and Effects on the Partner NGOs (Part 3). ....	10
Graph 4: Utility and Effects on the CBOs (Part 1).....	12
Graph 5: Utility and Effects on the CBOs (Part 2).....	14
Graph 6: Utility and Effects on the Indian Partner, participating in NGO-IDEAs since 2004.....	14
TABLES	
Table 1: Number of NGO-IDEAs tool application by group / CBO. ....	6
Table 2: Number of groups / CBOs which applied the <u>Tiny Tools</u> at least once. ....	6
Table 3: Number of <u>other projects</u> of the NGO-IDEAs partners which applied the NGO-IDEAs tools. ....	6
Table 4: Utility and Effects on the Partner NGO (Part1). ....	39
Table 5.1: Utility and Effects on the Partner NGO (Part2). ....	39
Table 5.2: Utility and Effects on the Partner NGO (Part2). ....	39
Table 6: Utility and Effects on the Partner NGO (Part3). ....	40
Table 7: Utility and Effects on the CBOs (Part1).....	40
Table 8: Utility and Effects on the CBOs (Part2).....	40
Table 9: Utility and Effects on Indian Partners, participating in NGO-IDEAs since 2004.....	40

## EXECUTIVE SUMMARY

This survey of NGO-IDEAs partners from the Global South was conducted with the aim to (1) get an overview of achievements and learning generated by the project, (2) collect some facts on the outcomes and impacts of the use of the NGO-IDEAs tools, and (3) get insight to the persisting challenges and to the suggestions for follow-up. Brainstorming results from three Regional Workshops in III-2011 provided the hypotheses to formulate the questions. Out of the 32 NGO-IDEAs partners 26 partners responded. With a return rate of 81%, the survey can be seen as representative.

The survey revealed that NGO-IDEAs II triggered a collective learning process for all partners; there have been many achievements in regard to the contribution of NGO-IDEAs towards the development of inclusive monitoring systems, promoting the empowerment of all stakeholders affected within partner organisations. However, there are also some challenges left to be overcome.

**Generally it can be concluded that the NGO-IDEAs project has had significant utility and effect on partner NGOs and on Community Based Organisations.**

The benefits of the approach on Partners from the Global South are seen in contributions to...

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• increase staff competency, knowledge and skills related to concept, outcome and impact monitoring;</li> <li>• increase management decisions oriented towards outcome and impact;</li> <li>• identify the achievements of goals and</li> <li>• identify very poor households.</li> </ul> | <ul style="list-style-type: none"> <li>• improve future project proposals;</li> <li>• accountability towards donors;</li> <li>• learning from experience in the NGO;</li> <li>• greater satisfaction, responsibility and commitment of NGO staff;</li> <li>• the adoption of action plans to beneficiaries needs.</li> </ul> |
|--|--|

Reservations of some partners have been identified in respect to the contribution of NGO-IDEAs to produce higher accuracy and reliability than traditional monitoring systems and the contribution to avoid failures. However, partners expressed, too, high expectations for future improvements in regard to internal reporting and reporting to funding partners on project outcomes and impacts.

Negative effects of the approach identified by some partners concern...

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• the time it consumes, which is more than some can afford;</li> <li>• a tendency that expectations of the beneficiaries towards the NGO have increased;</li> </ul> | <ul style="list-style-type: none"> <li>• problems in making the NGO-IDEAs approach compatible with project planning;</li> <li>• problems caused by the approach within the community.</li> </ul> |
|--|--|

In respect to the utility and effects of the NGO-IDEAs approach on the CBOs, the approach contributes to...

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• increase members' participation in decision making;</li> <li>• motivate members to achieve their goals;</li> <li>• enable CBOs/groups to manage their community projects better;</li> </ul> | <ul style="list-style-type: none"> <li>• strengthen the self-determination of individuals in order to overcome poverty or discrimination;</li> <li>• increase benefits of target groups from the project;</li> <li>• learn from experience.</li> </ul> |
|--|--|

Although the majority of partners agree that additional benefits of the approach justify the additional expenditure and effort, other partners seem to have some doubts on this, hence, are not fully convinced concerning the additional benefits or have too few resources to meaningfully apply the approach. This also corresponds to the perceived negative effect of the approach in respect to time consumption and needs further clarification.

*Indian partners* in the micro-financing sector who already *participated in the first phase of the project* generally conclude that the practice of participative impact oriented steering has been further improved. Improvements have also been identified in the area of satisfaction, benefit and involvement of SHGs and the contribution of NGO-IDEAs to finding new answers to challenges in the saving and credit sector.

**There are many lessons learnt while applying the NGO-IDEAs approach. These include key success stories as well as key challenges.**

KEY SUCCESS	KEY CHALLENGES
<p><b>NGOs / Staff</b></p> <ul style="list-style-type: none"> <li>improved planning, assessment, systematic documentation and reporting;</li> <li>created strong relationships between NGOs, CBOs and primary stakeholders;</li> <li>improved understanding, skills, abilities and confidence in applying the tools;</li> </ul> <p><b>CBO/groups</b></p> <ul style="list-style-type: none"> <li>are empowered to identify their needs, critically analyse their own situation;</li> <li>increased awareness towards their situation, needs, strengths and weaknesses;</li> <li>gained confidence in the projects and the goal achievement;</li> <li>set their own goals, plan activities for their achievement and assess their own performance;</li> <li>are owners of the development process, steer their projects themselves and expand their activities;</li> <li>are self-determined, active and cooperative and purposive in changing their situation;</li> <li>started appreciating the community/member participation.</li> </ul>	<p><b>NGOs / Staff</b></p> <ul style="list-style-type: none"> <li>data analysis (PIAR), attribution and systematically document data collected;</li> <li>adapting the tools to the different donor driven formats, harmonising them with NGOs general M&amp;E system, mainstreaming them to other projects / target groups;</li> <li>resources needed in respect to time, finances and trained manpower;</li> <li>managements respond and support, which determines the success of the approach;</li> </ul> <p><b>CBOs/groups</b></p> <ul style="list-style-type: none"> <li>the background of the members, e. g. education standard, attitudes and expectations, challenges the understanding and / or application of the tools;</li> <li>skills and confidence of field staff and group leaders to facilitate the introduction and assessment process on their own still need to be developed further.</li> </ul>

**Follow-up activities are seen as a distinct contribution to the continued success and sustainability of the project and have been identified in respect to funding partners, to partners from the Global South and CBOs.**

Follow-up by Funding Partners	Follow-up by the Partners from the Global South and CBOs/Groups	Follow-up to the CBO/Group
<ul style="list-style-type: none"> <li>continued technical support;</li> <li>(regional) coordination;</li> <li>providing for implied costs;</li> <li>dissemination of information.</li> </ul>	<ul style="list-style-type: none"> <li>continued exchange / networking;</li> <li>documentation of experience</li> <li>further adaptation, integration and mainstreaming of the tools</li> <li>continued capacity building of resource persons.</li> </ul>	<ul style="list-style-type: none"> <li>constant encouragement and guidance in the ongoing application process;</li> <li>continuous identification of key community facilitators/leaders;</li> <li>ownership of the process has to be transferred to the CBOs;</li> <li>NGOs need to continue monitoring the progress of the CBOs.</li> </ul>

## INTRODUCTION

In December 2011, the NGO-IDEAs II project is coming to an end. Therefore, a survey was conducted in September 2011 with the aim to

1. get an overview of achievements and learning generated by the project,
2. collect some facts on the outcomes and impacts of the use of the NGO-IDEAs tools, and
3. get insight to the persisting challenges and to the suggestions for follow-up.

In cooperation with Mr. Eberhard Gohl and Mr. Bernward Causemann as Project Leaders, Ms. C. Rajathi (India and Bangladesh), Mr. George Cottina (East Africa) and Mr. Godofredo Limotlimot (Philippines) as Regional Coordinators, a survey questionnaire was created and sent to all 32 NGO-IDEAs partners from the Global South. Brainstorming results from three Regional Workshops in III-2011 provided the hypotheses to formulate the questions. Most of the questions and statements were for scoring. Some questions allowed explaining specific experience of the partners.

According to the **return rate** the representativeness of the results is provided for:

Sample population	Return rate		Return rate by the region
	Absolute No.	Percentage	Percentage (each region calculated as 100%)
<b>32 NGO-IDEAs partners</b>	<b>26</b>	<b>81%</b>	
<b>10 East African partners</b>	9	28%	90%
<b>15 South Asian partners*</b>	10	31%	67%
<b>7 Philippine partners</b>	7	22%	100%

\* Feedback came from Indian partners only

Following are some general information about the partners from the Global South and quantitative information about their utilization of the NGO-IDEAs tools. After this a comprehension of the survey results will be presented, analysing the utility and effects of the NGO-IDEAs approach on partner NGOs and Community Based Organisations (CBOs), stressing important lessons learnt (key success and key challenges); describing major suggestions for the follow-up to funding partners, to NGO-IDEAs partners in the Global South and to the groups / CBOs who have applied the NGO-IDEAs approach. Finally, major findings are summarised and results linked.

### 1. GENERAL INFORMATION ABOUT THE NGO-IDEAs PARTNER NGOs

NGO-IDEAs II has 32 Partners from the Global South, including 10 African, 15 South Asian and 7 Philippine partners, all involved in the field of development cooperation:

Regions	Countries
South Asia	India, Bangladesh, Nepal
Philippines	Philippines
East Africa	Kenya, Uganda, Tanzania, Ethiopia

The partners are working in different **Sectors**:

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• Savings and Credits (and Livelihood)</li> <li>• Agriculture (or Rural Development and Livelihood)</li> <li>• Advocacy</li> </ul> | <ul style="list-style-type: none"> <li>• Education</li> <li>• Health/Nutrition</li> <li>• Disability (Inclusive Development, Community Based Rehabilitation)</li> </ul> |
|---|---|

The partner organisations work with different target groups, among others these include women, children, fisher folks, farmers, indigenous people.

## 2. THE UTILISATION OF NGO-IDEAs TOOLS BY PARTNERS IN NUMBERS

In an additional questionnaire the Regional Coordinators were asked to give a short quantitative overview on how generated outputs have been used by all the 32 partner organisations.

The following tables show in how many (a) groups / CBOs the main NGO-IDEAs tools and (b) the Tiny Tools have been applied, and in respect to further diffusion, to how many (c) additional projects within the partner organisation and (d) other NGOs the NGO-IDEAs tools have been introduced.

**Table 1: Number of NGO-IDEAs tool application by group / CBO.**

No. of application:	East Africa			Philippines			South Asia		
	1x	2x	3x or more	1x	2x	3x or more	1x	2x	3x or more
Tool:									
✓ <i>PWR</i>	49	6	-	40	-	-	687	67	-
✓ <i>SAGE</i>	142	51	22	27	17	10	683	488	176
✓ <i>PAG</i>	71	27	1	27	17	10	490	151	151
✓ <i>PIAR</i>	35	20	-	16	-	-	106	106	96

NGO-IDEAs tools have been applied in all three regions in different intensity. East African partners' main focus was on SAGE followed by PAG. In the Philippines, partners focused on PWR, SAGE

and PAG. South Asia, having the biggest number of partners, with some partners participating in NGO-IDEAs I and II and thus having long-term experience with the application of NGO-IDEAs tools, could invest more time in dissemination of the tools to other groups/CBOs. For PIAR, all groups were counted that were analysed by the NGO in a PIAR process. As many partners had not yet started applying PIAR, or only at an initial stage, the numbers are lower than for the first three tools. These figures are only about groups in those projects that were involved in NGO-IDEAs from the beginning.

**Table 2: Number of groups / CBOs which applied the Tiny Tools at least once.**

Tiny Tool:	East Africa	Philippines	South Asia
	No. Of groups / CBOs		
✓ <i>Lifeline</i>	8	2	-
✓ <i>Most Significant Changes</i>	18	9	-
✓ <i>Influence Matrix</i>	21	-	-
✓ <i>Gender Role Transformation</i>	-	-	3

The Tiny Tools have been mostly applied in East Africa with a focus on 'Most Significant Changes' and 'Influence Matrix'. Whereas the Philippines concentrated on the application of 'Most Significant

Changes', few South Asian partners solely applied the 'Gender Role Transformation' tool. This counts only partners and projects involved in the NGO-IDEAs process. Some tools have been used in other projects, too, after discussing them in the NGO-IDEAs process.

**Table 3: Number of other projects of the NGO-IDEAs partners which applied the NGO-IDEAs tools.**

Tool:	East Africa	Philippines	South Asia
	No. of projects		
✓ <i>PWR</i>	2	23	2
✓ <i>SAGE</i>	2	3	1
✓ <i>PAG</i>	1	3	-
✓ <i>PIAR</i>	-	-	-
✓ <i>Tiny Tools</i>	1	-	-

Dissemination of NGO-IDEAs tools to other projects of the partner organisations has been taking place for all tools except PIAR. PIAR needs to be applied at a later stage of projects that had not yet been reached here. One partner in the Philippines focused on the application of PWR within other projects.<sup>1</sup>

Some NGOs found the tools so beneficial that they applied them in other projects, too. The groups in table 3 can therefore be added to the groups in table 1.

<sup>1</sup> It turned out to be difficult to draw a clear line between projects involved and not involved in the process as not all organisations participating worked along project lines. Separate regional programmes were sometimes counted in table 3, sometimes in table 1. The number of people involved in projects or groups can vary widely.

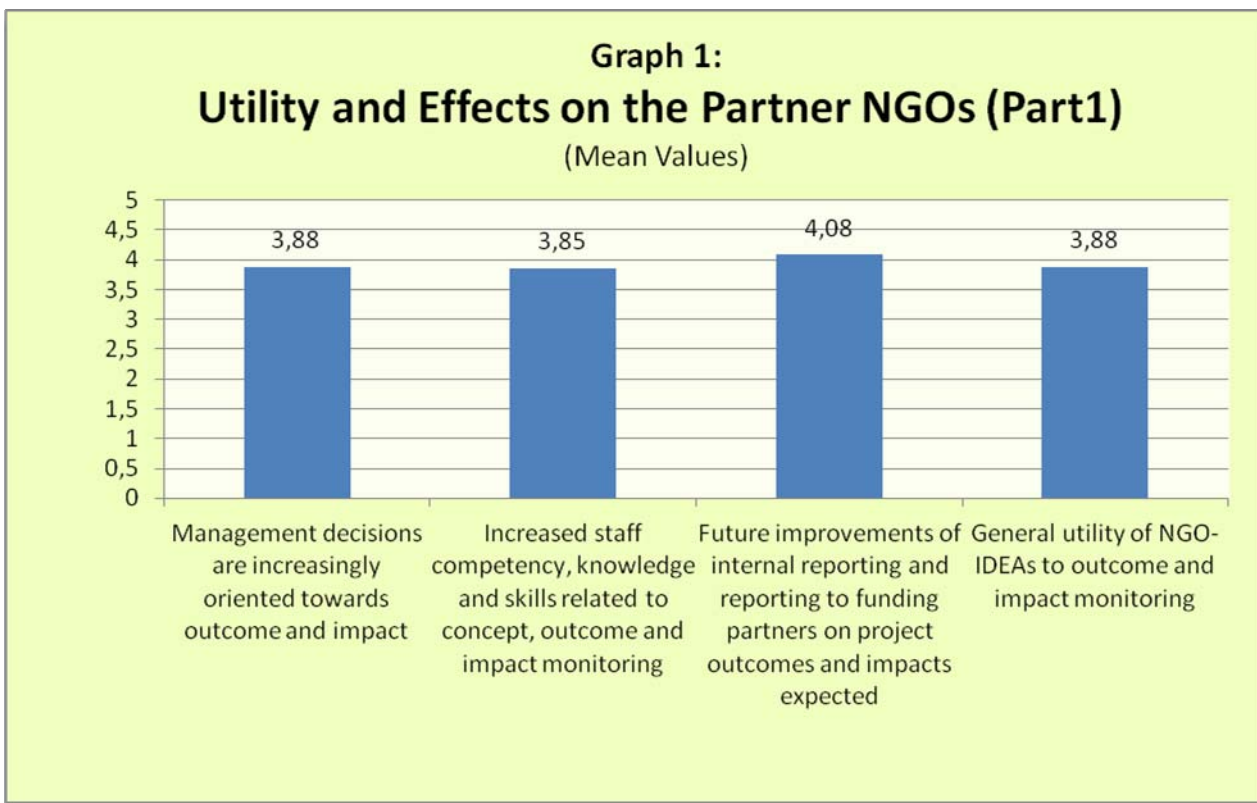
The tools were also taken up by a few NGOs that were not officially involved in NGO-IDEAs. The number of groups that the tools were applied in by these NGOs, are not known. Those would have to be added. Not counted are those NGOs that have been involved in NGO-IDEAs I in South Asia but that did not take part in NGO-IDEAs II. The number of groups that they apply the tools in are not known either.

### 3. UTILITY AND EFFECTS OF THE NGO-IDEAS APPROACH

#### 3.1 Utility and Effects on the Partner NGO

In respect to the utility and effects of the NGO-IDEAs approach towards the partner NGOs, questions were raised on several issues concerning the partners' improvement of their outcome and impact monitoring. Attention has been paid to the effects of NGO-IDEAs on impact oriented decision making, improved staff competency, satisfaction and commitment, need and impact oriented project proposals and action plans, identification of project beneficiaries, achievements of goals, internal reporting and reporting to funding partners (accountability) and the general usefulness of NGO-IDEAs to improve outcome and impact monitoring. Apart from this, risks and negative effects the approach could be associated with have been considered.

The following graph presents the results referring to the different outcomes:



With a **mean value of 4,08** the partners expectation of future improvements of their internal reporting and reporting to funding partners on project outcomes and impacts due to application of the NGO-IDEAs tools, has the highest mean within the first set of questions. Therefore, the average contribution to future improvements is slightly above sufficient.<sup>2</sup>

**Scoring for this part:**

- 1 = not at all
- 2 = little
- 3 = fairly
- 4 = sufficiently
- 5 = highly

► This means e.g.: "sufficiently" is the second best scoring.

<sup>2</sup> 20 partners (77%) expect *sufficient* (11 or 42%) or even *high* (9 or 35%) improvements.

uture improvements are expected due to many reasons. First of all, the competency, knowledge and skills of the partner organisations related to concepts, outcome and impact monitoring have been improved. This supported the tools being included in partner guidelines, and also their adaptations (e.g. into project Logframe). Reporting shifted from giving mainly quantitative (statistical) to including also qualitative information, and from output to outcome reporting. Furthermore, now it is the “outcome realized by the beneficiaries themselves” (P5, 6, 10, 26) that matters in reporting to funding partners.

- Tools give a *wider element of impact* unlike *before* when we *focused only on projects designed activities*. (P3)
- *The documentation of survey results (PWR, PAG, SAGE) and the reflection report (product of PIAR) will provide the evidence that illustrates progress in achieving program/project outcomes and impacts of respective groups/individuals/communities supported.* (P9)
- *(...) our internal reporting & reporting to funding partners on outcomes & impacts were surely improved due to the use of the toolbox. Our management was very supportive in our application of NGO IDEAs toolbox to our reporting system.* (P20)
- The analysis process will enable us *move from just numbers to giving reasons as to why we give that particular figure.* (P1)
- With NGO-IDEAs tools, the organization is looking forward *to incorporate the results of people's assessment* in relation to the extent of achievement on the goals they set to the reports that [our organization] is submitting to the funding partners. (26)

The opinion of partners on whether the NGO-IDEAs project has contributed to the orientation of management decision increasingly towards outcome and impact or not is rated with a **mean value of 3,88**, showing that the average contribution is close to sufficient.<sup>3</sup>

Examples given show that the NGO-IDEAs project complemented and enhanced the knowledge and skills of the partners on impact monitoring, which had important effects on the staff and management in regard to improving and adapting impact oriented monitoring and evaluation tools, decision making, project planning and reporting and the “commitment to continue with the process” (P1, 6, 26):

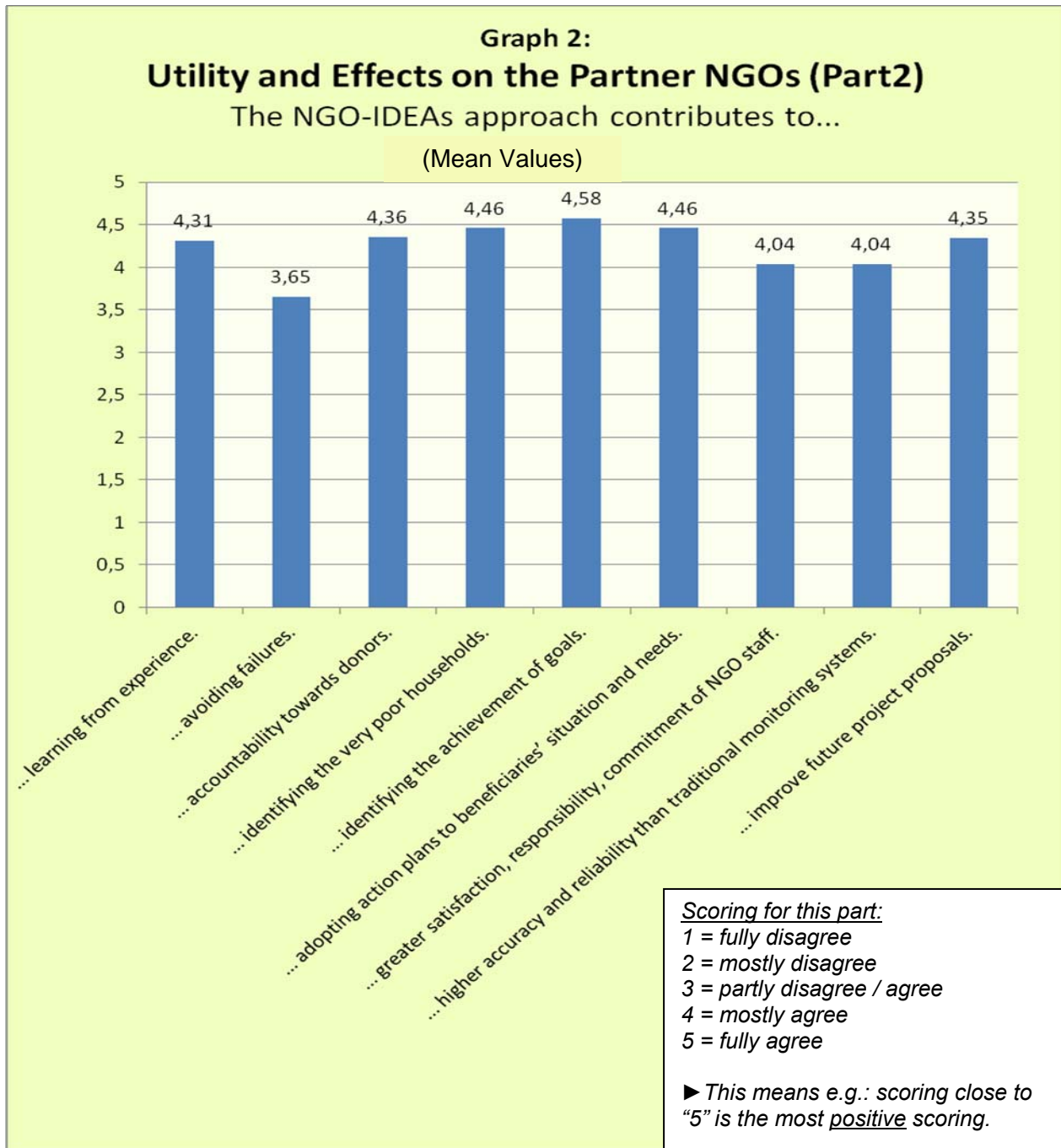
- Every department has [now] to report on impacts as a requirement. (P6)
- Engagement of (...) [our organization] in NGO-IDEAs II contributed a lot in the management decisions. All the staff and volunteers are encouraged to learn NGO IDEAs toolbox. *They highly recommended NGO-IDEAs tools as part of the staff development. The ongoing projects were directed towards outcome & impact. The new project proposals develop are impact oriented.* (P20)
- As I observed, it is a precise process of own assessment & goal establishment and development of realistic indicators which need to be achieved for improvement of the well being status. It also is a process of self determination. Hence, *the management had to modify the Plan of Action* accordingly and *training of staff* engaged were planned & conducted *to match the need including documentation & interim evaluation. The operational aspect is also getting modified.* (P23)
- The organizational management of (...) [our organisation] is *now motivated to give emphasis on monitoring the changes at the impact/outcome level*. In fact, such level of monitoring is already piloted in the 3 projects of (...) [our organisation]. The organizational management team even presented to its Board of Trustees its recommendation to have the NGO-IDEAs Tools be institutionalized. On the other hand, a symposium, introducing the participatory impact monitoring tools, is planned to be conducted in order to contribute to the academe. (P26)
- Using NGO-IDEAs tools *increases staff participation in organizational discussions on project outcomes and impact.* (P14)
- As a practitioner of NGO IDEA tool, the *management is convinced about the tool as it is developed by the people themselves.* (P17)

NGO-IDEAs further contributed to increased staff competency, knowledge and skills related to concept, outcome and impact monitoring. The **mean value is 3,85**, which shows that the average contribution is close to sufficient.<sup>4</sup>

<sup>3</sup> Feedback varies between *little* effects (2 partners / 23%) to *high* effects (7 partners / 27%). The majority, 11 Partners (42%), agree that NGO-IDEAs contributed *sufficiently* to increasing the orientation of management decision towards outcome and impact.

Generally the usefulness of NGO-IDEAs for partners outcome and impact monitoring was rated with a **mean value of 3,88**, i.e. the average of the partners judged the usefulness close to *sufficient*.<sup>5</sup>

NGO-IDEAs partners were also asked to judge up to which extent they agree with certain statements on **positive outcomes**. The following graph 2 shows the level of agreement with given statements:



With a **mean value of 4,58** the graph shows that the NGO-IDEAs approach contribution is most important in terms of identifying the achievements of goals.<sup>6</sup>

<sup>4</sup> The majority of partners (16 or 62%) agree that the contribution was *sufficient*, whereas 7 partners (27%) see the contribution as *fair*.

<sup>5</sup> 12 (46%) partners rate the contribution as *sufficient* and 6 (23%) as being *high*.

This is followed by the contribution to identify the very poor households<sup>7</sup> and the adoption of action plans to beneficiaries needs,<sup>8</sup> both with a **mean value of 4,46**.

The **mean value 4,36** shows that the average of partners mostly agrees with the statement that the NGO-IDEAs approach contributes to accountability towards donors.<sup>9</sup>

With a **mean value of 4.35** the average of the partners *mostly agrees* that the NGO-IDEAs approach contributes to improve future project proposals.<sup>10</sup>

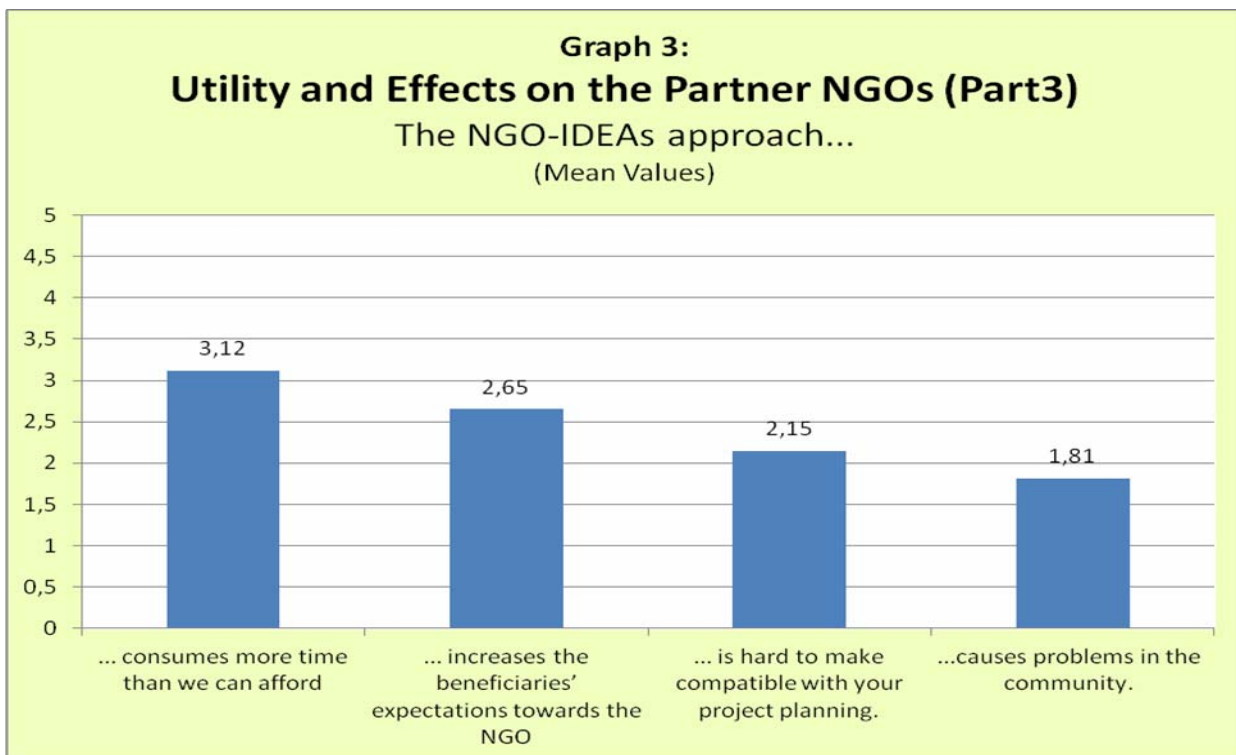
The contribution to learning from experience in the NGO has a **mean value of 4.31** indicating that most partners do mostly agree on that.<sup>11</sup>

Whereas the majority of partners *mostly agree* with the statement that the NGO-IDEAs approach contributes to greater satisfaction, responsibility and commitment of NGO staff, reflecting the **mean value of 4.04**. It is worth noting that 5 partners only *partly agree* with the statement.

Similarly, with the same **mean value of 4,04** partners *mostly agree* with contribution of NGO-IDEAs to producing higher accuracy and reliability than traditional monitoring systems, yet 6 partners (23%) only *partly agree* and one *mostly disagrees* with this statement. The result of this last statement can be seen in close relation with the answers to the following:

With a **mean value of 3,65** partner rate the statement that the approach contributes to avoiding failures as the least positive. Although the majority of partners – 16 partners (62%) – *mostly agree* with the statement it is also the most controversial statement as it is also the only statement where 2 partners *fully disagree* and 1 partner *mostly disagrees*. In addition there are also 4 partners who only *partly agree* with the statement.

As experience shows the NGO-IDEAs tools could also be associated with **risks and negative effects**. Therefore, statements were formulated to test the opinion of partners on the respective issues. The following graph gives an overview of some risks and negative aspects NGO-IDEAs could be associated with:



<sup>6</sup> 16 partner (62%) *fully agree* and 9 partner (35%) *mostly agree*

<sup>7</sup> 16 partners (62%) *fully agree*

<sup>8</sup> 13 partner (50%) *fully agree*

<sup>9</sup> 12 partners (46%) *mostly agree* and 11 partner (42%) *fully agree*

<sup>10</sup> 12 partners (46%) *fully agree* and the same number *mostly agrees*

<sup>11</sup> 12 partners (46%) *mostly agree* and 11 partner (42%) *fully agree*

A clear negative effect of the NGO-IDEAs approach is seen in that the approach consumes more time than some partners can afford. The **mean value** is the most challenging in this set of statements, with **3,12** it is clear partners see a negative impact on time when applying the approach.<sup>12</sup>

The **mean value of 2,65** shows a tendency that the NGO-IDEAs approach increases the expectations of beneficiaries towards the NGO.<sup>13</sup>

There is also a sign that some NGOs have problems with making the NGO-IDEAs approach compatible with their project planning. However, the **mean value of 2,15** shows that there might be slight challenges for some of the organisation.<sup>14</sup>

Problems that could be caused by the approach within the community are, however, rare, indicated by the **mean value of 1,81**.<sup>15</sup> Two of the partners that see some effects on the community describe the PWR tool and its categorizing of people as challenging. The community might be hesitant to reveal assets and not able to build consensus on ranking members. One partner suggests, "(...) *mutual concern among the community needs to be built. Only after that, implementation of the tool to be started*" (P12).

Scoring for this part:

- 1 = fully disagree
- 2 = mostly disagree
- 3 = partly disagree / agree
- 4 = mostly agree
- 5 = fully agree

► **NOTE:** scoring close to "5" is the most negative scoring.

### 3.2 Utility and Effect on the Community Based Organisation (CBOs)

In respect to the utility and effects of the NGO-IDEAs approach on Community Based Organisations (CBOs), statements on several issues were formulated and tested. Attention has been paid to comparing increased benefit from the project with possible additional expenditure and effort, improved CBO project management, and the contribution of the NGO-IDEAs approach to learning from experience, participation of members in decision making, motivation of members to achieve goals and strengthened individuals self-determination to overcome poverty and discrimination.

The following two graphs present an overview of the statements that partners were asked to agree or disagree with:

<sup>12</sup> 15 partners (58%) *partly disagree / agree*, 3 partners (12%) *mostly agree* and 4 fully agree with the statement.

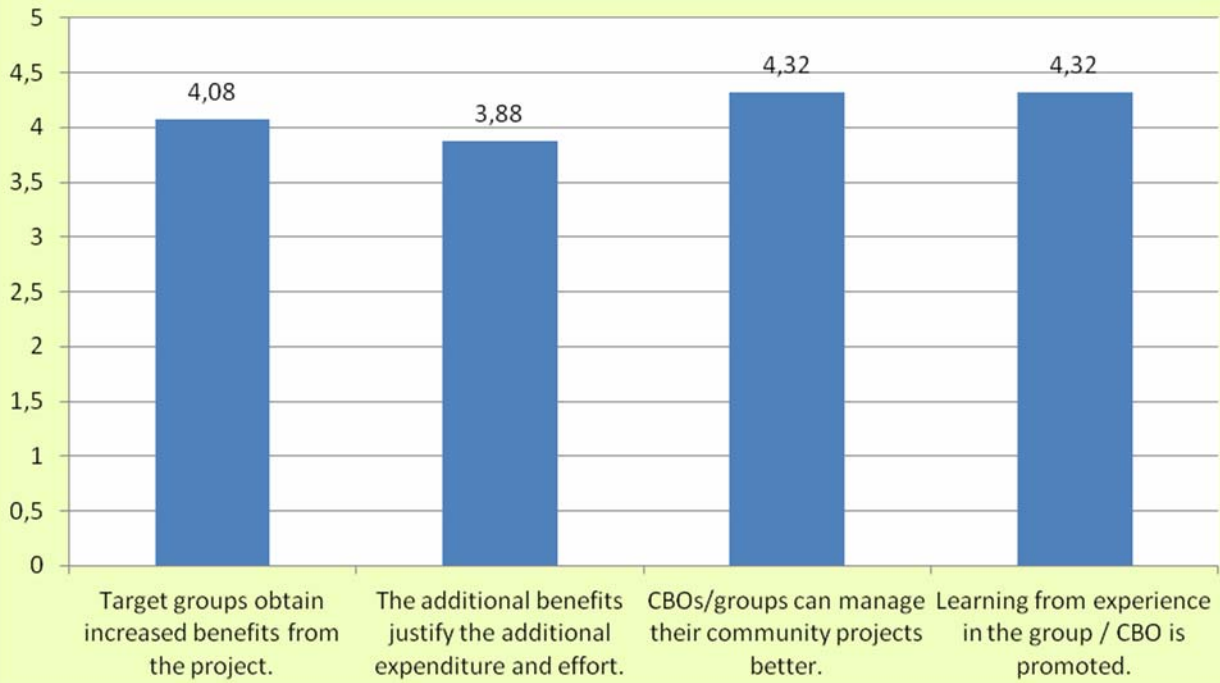
<sup>13</sup> 8 partners (31%) *partly disagree / agree*, 4 partners (15%) *mostly agree* and 2 partners (8%) *fully agree* with the statement.

<sup>14</sup> 4 partners (15%) *partly disagree / agree* and the same number *mostly agrees* with the statement.

<sup>15</sup> 1 partners (4%) *fully agrees*, 2 partners (8%) *mostly agree* with the statement.

**Graph 4:  
 Utility and Effects on CBOs (Part1)**

(Mean Values)



**Graph 5:  
 Utility and Effects on CBOs (Part2)**

(Mean Values)



The two graphs show that the contribution of the NGO-IDEAs approach is most important in terms of members taking better part in decision making and in motivating members to achieve their goals. Both are rated with a **mean value of 4.52**, i.e. partners are close to *fully agreeing* with the statements.<sup>16</sup>

Scoring for this part:

- 1 = fully disagree
- 2 = mostly disagree
- 3 = partly disagree / agree
- 4 = mostly agree
- 5 = fully agree

► This means e.g.: scoring close to “5” is the most positive scoring.

This is followed by the contribution of the NGO-IDEAs approach towards enabling CBOs/groups to manage their community projects better and to learning from experience. With a **mean value of 4.32**, for both of the

variables, these are the second most important effects of the NGO-IDEAs approach on CBOs.<sup>17</sup>

With a **mean value of 4.28**, i.e. above *mostly agreeing*, partners emphasises the importance of the NGO-IDEAs approach in respect to strengthening the self-determination of individuals to overcome poverty or discrimination.<sup>18</sup>

According to the **mean value of 4.08** the average partner *mostly agrees* with the statement that the NGO-IDEAs approach helps the target groups to obtain increased benefits from the project.<sup>19</sup>

The **mean value at 3.88**, the worst rating within this set of questions, indicates that NGO-IDEAs approaches’ additional benefits justify the additional expenditure and effort for the majority of partners although the rating is slightly below *mostly agree*.<sup>20</sup>

### 3.3 Utility and Effects on South Indian Partners, participating in NGO-IDEAs since 2004

9 Indian partners of NGO-IDEAs II already participated in the first phase of the project (2004-2007) which focused on the micro-finance sector. 7 of these 9 partners participated in the survey, 6 of these answered the set of specific questions directed towards them.

The specific questions aimed at evaluating (a) to what extent they have been able to improve the practice of participatory impact oriented steering in the area of micro-finance further in 2009 to 2011, (b) to what extent the NGO-IDEAs tools have contributed to increased satisfaction, benefit and involvement of the SHGs and (c) whether the NGO-IDEAs approach contributed to finding new answers to challenges in savings and credits sector or not.

<sup>16</sup> 15 partners (60%) *fully agree*, 8 partners (32%) *mostly agree* to the contribution in decision making. 13 partners (52%) *fully agree* and 12 partners (48%) *mostly agree* that the approach motivates members to achieve their goals.

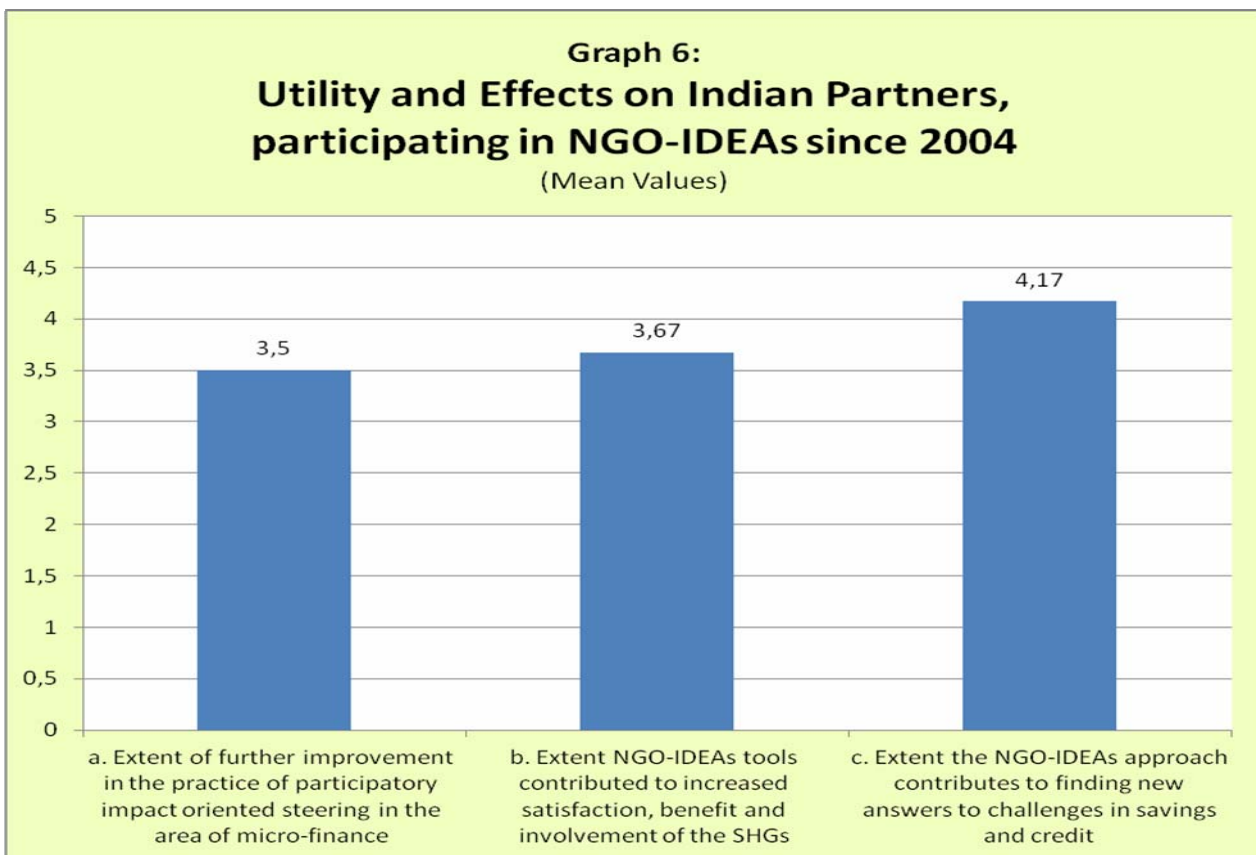
<sup>17</sup> Both statements received the same rating: 15 partners (60%) *mostly agree* and 9 partners (36%) *fully agree* with these statements.

<sup>18</sup> 10 partners (40%) *mostly agree* and 11 partners (44%) *fully agree* with the statement.

<sup>19</sup> 11 partners (44%) *mostly agree*, 8 partners (32%) *fully agree* with the statement.

<sup>20</sup> 10 partners (40%) *mostly agree* and 6 partners (24%) *fully agree* with the statement, 9 partners (36%) *partly disagree/agree*.

The following graph presents the results:



- a. With a **mean value of 3,67** the average contribution of the NGO-IDEAs approach to increase satisfaction, benefit and involvement in the SHG is below sufficient.<sup>21</sup>
- b. Same applies to the contribution of the approach to further improvements with respect to the practice of participatory impact oriented steering, with a **mean value of 3,5**.<sup>22</sup>
- c. In addition, with a **mean value of 4.17** average partners mostly agree with the statement that the NGO-IDEAs approach contributes to finding new answers to challenges in savings and credit.<sup>23</sup>

<u>Scoring for a / b:</u>	<u>Scoring for c:</u>
1 = not at all	1 = fully disagree
2 = little	2 = mostly disagree
3 = fairly	3 = partly disagree / agree
4 = sufficiently	4 = mostly agree
5 = highly	5 = fully agree
► This means e.g.: "sufficiently" is the second best scoring.	► This means e.g.: scoring close to "5" is the most positive scoring.

Examples on practices of participatory impact monitoring given:

- Beyond Yes or No answers, we developed coloring / grading method (sub indicators for each indicator) for SAGE. For example (P12):
  - I am working for safe drinking water as follows*
  - Within 1/2 km (yellow)
  - Within the house (Green)
  - Within the veranda (blue)
  - Within 1 km (red)
- Both our partners and CBOs make use of the tool to record their progress for future reference as well as to assess their achievements of different goals. (P17)
- The whole process of tool application assessment provided by the members (...) is an effective way of participatory evaluation. (P18)
- The community action plan at each group is a regular self monitoring method introduced by the project. (P18)
- Our working area is savings and credit sector. we always promote participatory methods . The group itself takes decision in sanction of internal loans, anything that group require they write a resolution and pass it in the groups meeting. Thus savings and credit program created lot of impact on the women. (P24)

## 4. LESSONS LEARNT

Partner Organisations described various key successes as well as key challenges at NGO and CBO level, describing why the partners have moved and what they still need to overcome:

### 4.1 Why we have moved

Responding to the statement ***“Why we have moved”*** partners described the general facts that the ***tools are themselves impact steering, awareness raising and empowering as a reason for change.*** The tools have not only ***improved planning, assessment, systematic documentation and reporting*** but also ***created strong relationships between NGOs, CBOs and primary stakeholders.*** On the level of the NGO staff ***improved understanding, skills and abilities*** and ***gained confidence in applying the tools.*** CBOs and groups are ***empowered to identify their needs and critically analyse their own situation.*** Hence, they have ***increased awareness*** on their situation, needs, strengths and weaknesses, as well as ***confidence in the project and goal achievement.*** Groups ***set their own goals, plan activities for their achievement and assess their own performance.*** The groups themselves are ***owners of the development process.*** ***Groups became more self-determined, active and cooperative and more purposive in changing their situation.*** Also ***CBOs started appreciating the community/member participation.***

- The engagement in NGO IDEAs enhances our system of Monitoring and evaluation which is outcome & impact oriented. (P20)
- Peoples' goal, (not program managers' goal) has been established. (P23)
- We have learnt the cost effective way of measuring the impact. As primary stakeholders actively participate in setting goals to measure their impact, which is the key success for achieving sustainable development. (P17)
- With the use of tools, the CBO and NGO experienced a productive discussions and learned that dialogue or group discussions indeed are effective way of resolving conflicts and in moving the group forward to the achievement of their development goals. (P26)
- A space created for individuals in the group and organisers in the organisation to understand their strength and shortcomings. (P18)
- The tools helped the people to make a systematic development in the agricultural activities in which they practice for a successful implementation of agricultural activity both for the people and for (...) [our organization]. (P25)
- We appreciate and learn more impact monitoring and evaluation. We realize the level of our impact in our partners and the services that we do. We become more analytical and people based. (P16)
- Increased understanding on the need to solve their problems themselves (group members). (P5)
- It gave a deeper understanding of the NGO's role and their responsibility to the stakeholders. (P26)
- It is a self-awakening process primarily for the stakeholders and then for the Project Management. (P22)
- Exercise of tool SAGE motivates and encourages the members to identify their needs and set a goal and plan to attain the goal. (P11)
- The CBO formulated the purpose, the vision and mission for which their group is in existence in relation to the management of the water system. (P26)
- The use of the tools have encouraged the group to set goals which they have not done in their personal life and see the value of they themselves assessing the status of the goal they set. (P9)
- The exercise of Tool SAGE motivates and encourages the group members to identify the needs, plan to access those needs and execute their strategies. In a way it make them to own their development process.
  - E.g. initiating collective income generation activity by mobilizing the fund sources from (...) [our organization] and Bank.
  - Participation & taking issue to the (...) [community meetings]. (P11)
- Full participation of the children in coming up with their individual and group goals/indicators using the NGO-IDEAs tool (PAG, SAGE, PIAR) facilitated clear implementation of children's planned activities and monitoring of changes in the lives of the children that we work with. (P14)
- Tools are empowering: The use of PWR, SAGE and PAG tools promote high awareness of development among individuals and groups. (P9)
- The exercise of tools facilitates the participatory decision making process in the group. (P11)

## 4.2 What we still need to overcome

In respect to identified key challenges of NGO-IDEAs partners described “***What we still need to overcome.***” One major concern to the partners is the issues of *data analysis (PIAR), attribution and systematically documentation of data collected.* Still to overcome is the challenge of *adapting* the tools to the different donor driven formats, *harmonising* them with NGOs general M&E system and *mainstreaming* them to other projects/target groups. Apart from this the approach *needs a lot of resources* in respect to time, finances and trained manpower. Also the *management’s response and support* to the approach determines the success of the approach. On the side of the CBOs/groups the *background of the members*, i.e. education standard, especially low literacy level, attitudes, beliefs and expectations, *challenges the understanding and / or application of the tools.* Additionally, *skills and confidence of field staff and group leaders* to facilitate the introduction and assessment process on their own still need to developed further.

- Inadequate skills on data entry & analysis using GrafStat (P2)
- Data: - analysis, -attribution, -documentation (P6)
- PIAR Analysis and documentation (P24)
- The NGO tools focus on outcomes but there is **still a real need to also monitor inputs and outputs.** We are implementing an Integrated Rural Development Program with various components. **Our key challenge is how to systematically store and retrieve the data that we generate for various components.** (P10)
- **Process and output documentation of the tools** is one of the challenges that we need to overcome because of the limited staff. Volunteers were maximize in order to update data encoding. (P20)
- Need to **harmonize the routine M &E to incorporate NGO IDEAs tools** (P4)
- **Mainstreaming the use of the tools to all of the projects** being implemented by (...) [our organization] (P26)
- Review of facilitation guides and also indicators to **include what is already happening** at the SH approach concept. (P1)
- **In (...) [our organistaion] for right based programs this has hardly any use.** (P19)
- This is **more donor driven tool**, whereas at (...) [our organistaion] for each project donor define different format for **impact monitoring.** (P19)
- It is a little bit **time consuming:** One has to maintain the sequences chronologically; It demands regular contact with the stakeholders; It requires active participation of all the stakeholders at the same time in the same way. (P22)
- **Limited number of staff with appropriate knowledge** for rollout who might be assigned to other responsibilities as a result of organizational restructuring. (P9)
- **The technical persons and senior officials still need to be convinced.** (P17)
- Low level understanding of the members due to **illiteracy and rural background.** (P11)
- **Attitude change from believing in handouts to guiding beneficiaries towards self-reliance** (on the part of project owners). (P5)
- [In Well-being Ranking,] the people have the mindset that the **revelation of their assets may block the welfare benefits** provided by government/development agencies. The process of **breaking through the mindset** is difficult and time consuming. (P11)

## 5. SUGGESTIONS FOR FOLLOW-UP

Partners were further asked to formulate suggestions for follow-up to funding partners, to the NGO-IDEAs partners in developing countries / Global South and to the groups/CBOs who have applied the NGO-IDEAs approach:

### 5.1 Follow-up by the Funding Partner

In respect to the *follow-up by the funding partners* of major concern is the continued technical support and (regional) coordination even after the end of NGO-IDEAs. Resources of implied costs, i.e. support organisational roll out of the tools into the M&E systems, staff participation and training (e.g. Training of Trainers and on data entry and analysis), have to be provided for. Dissemination of information, like a final copy of the NGO-IDEAs tools, training/resource material, sharing of reports on quarterly basis are of concern to some partners.

- Continuous coordination to help us sustain our efforts. We need both moral and technical support. (P16)
- This project involves the partners in the process ultimately stabilize, strengthen the Savings and Credit management activity and sustain the group activity in the long run. Partners are still in different stages of tool application. At this point they may require support hand to run the project successfully. So the follow-up to the funding partners is desirable. (P18)
- Conduct national review meetings. (P7)
- There is need for further testing of the tools to the groups and other new groups for learning and sharing. (P15)
- Further review and adaptation of the tools to capture impact in disability interventions. (P15)
- Enough flexible in application of tool box. Because we are in the process of practicing it in the field. (P24)
- Use of these tools as process of learning to the community and a instrument to assess the implementing organisation's performance. It requires more human, finance resources and sufficient time. (P11)
- The funding partners may ask the implementing partners to include NGO IDEAs tools in the project monitoring system and may also support for additional expenses like training to the associations. (P12)
- Monitoring, evaluation and reporting system using NGO-IDEAs toolbox is a must in every projects that they will approve. (P20)
- Keeping this tool Box as in built in the Project Proposal as compulsion for Project Formulation, Planning , Monitoring and Evaluation also. (P22)

### 5.2 Follow-up by the Partners in the Global South

The *follow-up to by NGO-IDEAs partners in developing countries / Global South* needs to consider three major concerns: To begin with (1) continued exchange/networking and documentation of experience even after NGO-IDEAs. Ideas on how to assure this include continued regional coordination support, maintaining a common website and joint email address, continue organizing exposure visits and (annual) international or regional review meetings of partners, developing a resource center and consortium. Follow-up should also consider the (2) adaptation, integration and mainstreaming of the tools to e.g. specific sectors, other projects, NGOs M&E system and other branches of the NGO. Therefore, (3) capacity of resource persons needs to be build further.

- To **continually be connected** even after the project term of NGO-IDEAs and continue the sharing of experiences and lessons learned in the use of the various participatory impact monitoring tools. (P26)
- We suggested that **partners continue to meet at least once a year** to allow us to exchange notes on what we have learned and how we can learn from each other. When we went to India we discussed whether we could look at the tools specifically as applied to agricultural projects, children, women etc. **We have not had really a chance to discuss whether there are peculiarities in different sector or project types.** (P10)
- In south also **different partners are in different stages of tool application** in different sectors. PIAR - the tool application and the technical support like software adoption in tool application for result assessment and analysis may require **help from the Regional level.** (P18)
- **Adopting this as firstly for monitoring and evaluation; then for project formulation and implementation** ; making the management more and more conversant of the idea through discussion, seminar, workshop, consultative etc.; going through the publications and success stories on other practicing NGOs . (P22)
- Try to consider the NGO IDEAs tools as **part and parcel of the monitoring and evaluation system** and not as a separate entity. (P12)

### 5.3 Follow-up to the Groups / CBOs

In respect to ***the follow-up to the groups/CBOs*** who have applied the NGO-IDEAs approach a ***constant encouragement and guidance in the ongoing application process*** is seen as crucial. CBOs should be encouraged to ***continue the application, adaptation and mainstreaming*** of the tools even after NGO-IDEAs has come to an end. ***Exchange of experience and ideas*** (peer-learning) should be encouraged through inter group visits. ***Capacity needs to be build*** further and ***key community facilitators / leaders*** continuously need to be ***identified***. ***Ownership*** of the process needs to be ***transferred to the CBOs*** while ***NGOs*** need to ***continue monitoring the progress of the CBOs.***

- There is a need for a **constant follow up and encouragement** to our CBO partners in order for them not to forget their plans for continuous impact monitoring and evaluation. (P16)
- **NGOs need to extend support to CBOs** till they became confident of applying the tool independently. (P17)
- Any project or program of an organisation requires a **systematic and more scientific self evaluation** and monitoring system for the effective program implementation. It should be **developed within the system** as a regular mechanism. We need to practice it, continue it and try to make it as an inbuilt system. (P18)
- **Empowering the groups** to ensure that **the tools tested be part of the group continuous monitoring tools for impact.** (P15)
- If they do the **PWR, SAGE and PAG exercise in regular intervals** (PWR once in 3 year, SAGE & PAG every year) can understand and aware of their development and growth. It can also **help them to make a productive decision.** (P11)
- **Continue monitoring the progress** of the group/CBOs using the tools and provide feedback/learning report to the secretariat of NGO-IDEAs. (P14)

## 6. SUMMARY AND LINKING THE RESULTS

The survey revealed that NGO-IDEAs II triggered a collective learning process for all partners, CBOs / groups; there have been many achievements in regard to the contribution of NGO-IDEAs towards the development of inclusive monitoring systems, promoting the empowerment of all stakeholders affected within partner organisations. However, there are also some challenges left to be overcome.

**Generally it can be concluded that the NGO-IDEAs project has had significant utility and effect on partner NGOs and on Community Based Organisations.**

The benefits of the approach on Partners from the Global South have been made clear by the partners. Staff competency, knowledge and skills related to concept, outcome and impact monitoring have been increased and the management decisions have been increasingly oriented towards outcome and impact. There are still high expectations for future improvements due to the application of the tools in regard to internal reporting and reporting to funding partners on project outcomes and impacts.

The NGO-IDEAs approach contribution is, too, seen as important in terms of identifying the achievements of goals and very poor households. Also meaningful contributions have been made to the adoption of action plans to beneficiaries needs and to improve future project proposals, to accountability towards donors and learning from experience in the NGO. Greater satisfaction, responsibility and commitment of NGO staff have been achieved in the bigger part of the partner NGOs. However, some partners seem to agree that two issues could still be subject to further discussion and improvements: a. the contribution to producing higher accuracy and reliability than traditional monitoring systems, and b. especially the contribution to avoiding failures. Further clarification is needed on whether problems of respective partners do result from other constraints, e.g. lack of resources or from the approach itself.

In regard to negative effects and risks of the NGO-IDEAs approach majority of partners see an effect of the approach on the time it consumes, which is more than some can afford. Some NGOs see a tendency that expectation of the beneficiaries towards the NGO are increased through the approach, and also identified problems in making the NGO-IDEAs approach compatible with project planning. Two partners described problems caused by the approach within the community, especially in respect to PWR-tool.

Positive effects of the NGO-IDEAs approach on CBOs were highlighted. The bigger part of partner organisations basically either mostly or fully agreed with formulated statements of utility and effects on the CBOs. However, the application of NGO-IDEAs tools having made most important contributions in increasing members' participation in decision making, hence, less leader domination and in motivating members to achieve their goals.

Beyond that CBOs/groups were enabled to manage their community projects better and to learn from experience. The self-determination of individuals has been strengthened in order to overcome poverty or discrimination and target groups obtained increased benefits from the project. Although majority of partners agree that additional benefits of the approach justify the additional expenditure and effort, some partners seem to have some doubts on this, hence, are not fully convinced of the additional benefits or have too few resources to meaningfully apply the approach. This also corresponds to the perceived negative effect of the approach in respect to time consumption and needs further clarification.

Indian partners in the micro-financing sector who already participated in the first phase of the project generally conclude that the practice of participative impact oriented steering has been further improved. Improvements have also been identified in the area of satisfaction, benefit and involvement of SHGs and the contribution of NGO-IDEAs to finding new answers to challenges in savings and credits sector.

**There are many lessons learnt while applying the NGO-IDEAs approach. These include key success stories as well as key challenges.**

NGOs and CBOs appreciate the process stimulated by applying the tools as it results in improved planning, assessment, systematic documentation and reporting, and stronger relationships between NGOs, CBOs and primary stakeholders. NGO staff improved understanding, skills and abilities and gained confidence in applying the tools. CBOs and groups are empowered to identify their needs and critically analyse their own situation. They have increased awareness on their situation, needs, strength and weaknesses, as well as confidence in the projects and the goal achievement. Groups set their own goals, plan activities for their achievement and assess their own performance. The groups themselves are owners of the development process, steer their projects themselves and expand their activities. Groups became more self-determined, active and cooperative and more purposive in changing their situation. Also CBOs started appreciating the community/member participation.

One major concern to the partners is the issue of data analysis (PIAR), attribution and systematically document data collected. Still to overcome is the challenge of adapting the tools to the different donor driven formats, harmonising them with NGOs general M&E system and mainstreaming them to other projects/target groups. According to many partners, the approach needs a lot of resources in respect to time, finances and trained manpower. Also the management's response and support to the approach determines the success of the approach. On the side of the CBOs/groups the background of the members, i.e. education standard, especially low literacy level, attitudes, beliefs and expectations, challenges the understanding and / or application of the tools. Additional to that skills and confidence of field staff and group leaders to facilitate the introduction and assessment process on their own still need to be developed further.

**Follow-up activities are seen as a distinct contribution to the continued success and sustainability of the project and have been identified in respect to funding partners, to Partners from the Global South and CBOs.**

The funding partners need to consider follow-up activities which include continued technical support and (regional) coordination, providing for implied costs, and dissemination of information. The follow-up by and to the partners from the Global South and CBOs should consider the continued exchange/networking and documentation of experience, further adaptation, integration and mainstreaming of the tools and continued capacity building of resource persons. CBOs/groups need constant encouragement and guidance in the ongoing application process, key community facilitators / leaders need to be identified continuously. Ownership of the process has to be transferred to the CBOs while NGOs need to continue accompanying the CBOs.

**Annex 1: Questionnaire survey Partners from the Global South.**

Dear NGO-IDEAs partners,

The NGO-IDEAs II project is coming to an end. For our self-assessment, we kindly request you to fill in this questionnaire.

With this survey we would like to (1) get an overview of achievements and learning generated by the project and (2) collect some facts on the use and utility of the NGO-IDEAs tools.

This information will be shared with all partners before the end of 2011.

Most of the questions are for scoring: just click in the applicable tick-box. Some questions allow you to explain your specific experience. We appreciate if you explain in full sentences. If the question is not applicable, please leave the box empty.

For the purpose of follow-up on specific issues we request you to give your name and organisation. For the summarising report, anonymity is guaranteed.

Please send your answers (only one questionnaire for each partner organisation) to Martina Rithaa: [rithaa@impact-plus.de](mailto:rithaa@impact-plus.de) by September 15th, 2011.

We thank you very much for your support!

Bernward Causemann and Eberhard Gohl  
 Project Leaders

**0. Basic Information**

Evaluation date:

Person who filled in the questionnaire:

Name of the partner organisation:

Sector of Work:

Country:

**I. UTILITY AND EFFECTS ON THE PARTNER NGO**

(The following questions are about your organisation, the NGO that participated in the NGO-IDEAs process)

**1. To what extent has the use of NGO-IDEAs tools contributed to orienting your management decisions increasingly towards outcomes and impact?**

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all	Little	Fairly	Sufficiently	Highly

**Please give some examples:**

**2. To what extent has NGO-IDEAs increased your staff's competency, knowledge and skills related to concept, outcome and impact monitoring?**

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all	Little	Fairly	Sufficiently	Highly

**3. As a practitioner of NGO-IDEAs, do you expect any future improvements of your internal reporting and reporting to funding partners on project outcomes and impacts due to application of the NGO-IDEAs tools?**

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all	Little	Fairly	Sufficiently	Highly

**Please give some examples:**

**4. As a practitioner of NGO-IDEAs, how useful was NGO-IDEAs for your outcome and impact monitoring?**

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all	Little	Fairly	Sufficiently	Highly

**5. To what extent would you agree with the following statements:**

	Fully disagree	Mostly disagree	Partly disagree / agree	Mostly agree	Fully agree
5.1 The NGO-IDEAs approach contributes to learning from experience in the NGO.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.2 The NGO-IDEAs approach contributes to avoiding failures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.3 The NGO-IDEAs approach contributes to accountability towards donors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.4 The NGO-IDEAs approach contributes to identifying the very poor households.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.5 The NGO-IDEAs approach contributes to identifying the achievement of goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.6 The NGO-IDEAs approach contributes to adopting action plans to beneficiaries' situation and needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Fully	Mostly	Partly	Mostly	Fully

	disagree	disagree	disagree / agree	agree	agree
5.7 The NGO-IDEAs approach contributes to greater satisfaction, responsibility and commitment of NGO staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.8 The NGO-IDEAs approach produces higher accuracy and reliability than traditional monitoring systems.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.9 The NGO-IDEAs approach contribute to improve future project proposals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>6. The NGO-IDEAs tools can also be associated with risks and negative effects. What is your opinion on the following statements?</b>					
	Fully disagree	Mostly disagree	Partly disagree / agree	Mostly agree	Fully agree
6.1 The NGO-IDEAs approach consumes more time than we can afford.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.2 The NGO-IDEAs approach increases the beneficiaries' expectations towards the NGO.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.3 The NGO-IDEAs approach is hard to make compatible with your project planning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4 The NGO-IDEAs approach causes problems in the community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.5 a) If so, please describe the respective tool and the problems it causes:					
6.5 b) How can these problems be overcome?					

**II. UTILITY AND EFFECTS ON COMMUNITY BASED ORGANISATION (CBOs)**

**7. To what extent would you agree with the following statements:**

	Fully disagree	Mostly disagree	Partly disagree / agree	Mostly agree	Fully agree
7.1 The NGO-IDEAs approach helps the target groups to obtain increased benefits from the project.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2 The additional benefits justify the additional expenditure and effort.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.3 Through the NGO-IDEAs approach CBOs/groups can manage their community projects better.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.4 The NGO-IDEAs approach contributes to learning from experience in the group / CBO.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.5 The NGO-IDEAs approach contributes to members taking better part in decision making (=less leader domination; 'participation increased').	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.6 The NGO-IDEAs approach contributes to motivating members to achieve their goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.7 The NGO-IDEAs approach strengthens the self-determination of individuals to overcome poverty or discrimination.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**III. LESSONS LEARNT**

**8. What are the main lessons learnt from the NGO-IDEAs process in your organisation (NGO) and the groups (CBOs) you work with?**

**8.1 Please describe key success – Why you say you have moved:**

**8.2 Please describe key challenges – What you still need to overcome:**

**IV. SUGGESTIONS FOR FOLLOW-UP**

**9. What are your main suggestions for the follow-up to the funding partners?**

Text input area for question 9.

**10. What are your main suggestions for the follow up to the NGO-IDEAs partners in developing countries / Global South?**

Text input area for question 10.

**11. What are your main suggestions for the follow up to the groups/CBOs who have applied the NGO-IDEAs approach?**

Text input area for question 11.

*In case your organisation has been part of NGO-IDEAs I (2004-2007) go to question no. 12. If not, please proceed to the end.*

**V. SPECIFIC QUESTIONS FOR THE NGO-IDEAs PARTNERS IN SOUTH INDIA WHO PARTICIATED IN THE FIRST NGO-IDEAs PROJECT 2004-2007**

**12. To what extent have you been able to improve the practice of participatory impact oriented steering in the area of micro-finance (savings and credit) further in 2009 to 2011?**

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all	Little	Fairly	Sufficiently	Highly

***Please give some examples:***

Text input area for examples.

13. To what extent have the NGO-IDEAs tools contributed to increased satisfaction, benefit and involvement of the SHGs .					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Not at all	Little	Fairly	Sufficiently	Highly	
14. To what extent would you agree with the following statements:					
	Fully disagree	Mostly disagree	Partly disagree / agree	Mostly agree	Fully agree
The NGO-IDEAs approach contributes to finding new answers to challenges in savings and credits.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**THANK YOU FOR YOUR EFFORT!**

## Annex 2: Evaluation of open ended questions.

**Q1: To what extent has the use of NGO-IDEAs tools contributed to orienting your management decisions increasingly towards outcomes and impact?**

Category	Answers
<p><u>Improved (outcome and impact oriented) Planning</u></p>	<ul style="list-style-type: none"> <li>• As I observed, it is a precise process of own assessment &amp; goal establishment and development of realistic indicators which need be achieved for improvement of the well being status. It also is a process of self determination. Hence, the <i>management had to modify the Plan of Action accordingly and training of staff engaged were planned &amp; conducted to match the need including documentation &amp; interim evaluation. The operational aspect is also getting modified.</i></li> <li>• Proper planning and prioritization.</li> <li>• The new project proposals develop are impact oriented.</li> <li>• To prepare Community action Plan and deal it in monthly meetings to achieve the tasks.</li> <li>• The on going projects were directed towards outcome &amp; impact.</li> </ul> <p><i>Identifying target group</i></p> <ul style="list-style-type: none"> <li>• (our organization) [...] adopted <i>PWR in identifying most vulnerable children and families</i> in program areas as priority for enrolment to sponsorship and program intervention.</li> <li>• To identify the poorest of the poor</li> </ul> <p><i>Specific needs / goals</i></p> <ul style="list-style-type: none"> <li>• Yearly plans incorporate beneficiary goals</li> <li>• Identification of specific needs.</li> <li>• To identify their group and individual goals effectively</li> <li>• To fix goals suits according to their situation through discussion and participation</li> </ul> <p><i>Changes in plans</i></p> <ul style="list-style-type: none"> <li>• After application of tool box we <i>changed our plan of action based on the results we received</i>.</li> <li>• Partner CBOs (...) <i>utilized SAGE and PAG results in the refinement of interventions</i> as detailed in the respective ADPs' implementation plan more supportive to the achievement of goals developed in SAGE and PAG.</li> <li>• Our member cooperatives <i>adjusted their plans based on the result of the NGO Ideas PIAR</i></li> <li>• New proposals</li> <li>• (our organization) [...] is preparing a new project proposal with base of the results of NGO IDEAs tools</li> <li>• The new project proposals develop are impact oriented.</li> </ul>
<p><u>Effects on management</u></p>	<ul style="list-style-type: none"> <li>• The tools <b>helped the management to mentor/guide the staff</b> on the "how to monitor indicators of changes" of the project implementation in terms of quantity and quality.</li> <li>• <b>Improved and adapted monitoring and evaluation tools</b></li> <li>• As a practitioner of NGO IDEA tool, the <b>management is convinced about the tool</b> as it is developed by the people themselves.</li> <li>• <i>The management decided to continue this tool box application even after completion of the project</i>.</li> <li>• The organizational management of (our organization) [...] is now <i>motivated to give emphasis on monitoring the changes at the impact/outcome level</i>. In fact, such level of monitoring is already piloted in the 3 projects of (our organization) [...]. The organizational management team even presented to its Board of Trustees its recommendation to have the <i>NGO-IDEAs Tools be institutionalized</i>. On the other hand, a symposium, introducing the participatory impact monitoring tools, is planned to be conducted in order to contribute to the academe.</li> <li>• <b>Better relationship and cooperation.</b></li> <li>• Tools have enabled us to <b>work independently without interfering with others.</b></li> <li>• To take <b>policy decisions on local contribution favouring pro-poor.</b></li> <li>• <b>Improved participation of the individual family households and groups in assessing the impact of interventions on disability.</b> To Provide credit to the members based on the tool application PWR.</li> </ul>

<u>Increased knowledge and skills</u>	<ul style="list-style-type: none"> <li>• Staff has been trained on impact monitoring tools.</li> <li>• The NGO-IDEAs tools complemented and further enhanced the knowledge and skills of the organization in monitoring outcomes and impact. (ex. result based management)</li> <li>• Using NGO-IDEAs tools increases staff participation in organizational discussions on project outcomes and impact.</li> <li>• Engagement of (our organization) [...] in NGO-IDEAs II contributed a lot in the management decisions. All the staff and volunteers are encouraged to <i>learn NGO IDEAs toolbox</i>. They highly recommended NGO-IDEAs tools as part of the staff development.</li> <li>• A <i>thorough understanding</i> on the requirement of roles and responsibilities of the organisation in the S&amp;C program</li> <li>• Understanding the impact of the S&amp;C program in the context of general socio economic situation.</li> </ul>
<u>Outcome and Impact oriented reporting</u>	<ul style="list-style-type: none"> <li>• Reporting has shifted from being output oriented to outcome/impact oriented</li> <li>• Every department has to report on impacts as a requirement.</li> </ul>
<u>Other positive Effects</u>	<ul style="list-style-type: none"> <li>• Commitment to continue with the process</li> </ul>
<u>Challenges</u>	<ul style="list-style-type: none"> <li>• Top management decisions makers are not full convinced of the approach.</li> <li>• Till now NGO Idea is project specific in (our organization) [...] therefore we have not taken this upto the management decision level. It is very much still confined to donor driven project. Hence forth this is unlikely to be implemented for the right based project of (our organization) [...].</li> </ul>
<b>4 WITHOUT ANSWER</b>	

**Q3: As a practitioner of NGO-IDEAs, do you expect any future improvements of your internal reporting and reporting to funding partners on project outcomes and impacts due to application of the NGO-IDEAs tools**

<u>Category</u>	<u>Answers</u>
<u>Output vs Outcome / Impact</u>	<ul style="list-style-type: none"> <li>• Tools give a wider element of impact unlike before when we focused only on projects designed activities.</li> <li>• In the previous reporting/planning formats ...results in planning not reflected in reporting...I hope the result of the tools will help to fill the gap. <i>Our reporting format (...) will reflect not only activities /outputs but also impact.</i> (Action plan/ achievement report)</li> <li>• [Our organization ](...) shall <i>report to the funding partners about the project outcomes</i> with the application of NGO IDEAs tools in the future</li> <li>• <i>The documentation of survey results (PWR, PAG, SAGE) and the reflection report (product of PIAR) will provide the evidence that illustrates progress in achieving program/project outcomes and impacts of respective groups/individuals/communities supported.</i></li> <li>• The results of outcome &amp; impact are being reported to the funding partners.</li> <li>• Our reports would based more on impact of our work</li> </ul>
<u>Integration / Adaptation of tools</u>	<ul style="list-style-type: none"> <li>• By put tools forward in our guidelines for all groups in their planning and implementation.</li> <li>• This tool has to be included in the planning process of the project before writing the project</li> <li>• <i>Further Adaptation of the current tools to capture impact</i> on the quality of life our target group( children and adults with disabilities) especially on qualitative analysis</li> <li>• [Our organization ](...) has already begun <b>utilizing the NGO-IDEAs tools into project LFA.</b></li> </ul>
<u>Increased knowledge and skills</u>	<ul style="list-style-type: none"> <li>• The staff are well equipped and have got the competency to steer the projects based on the outcomes and impact due to the application of the NGO IDEA tool</li> <li>• The level of understanding at the skill development has been increase and has got clarity while reporting to donors. The relation between concept, outcome and impact monitoring has got clarity and thus has well contributed to the progress report compilation.</li> </ul>

<u>Quantitative and Qualitative information</u>	<ul style="list-style-type: none"> <li>The analysis process will enable us <i>move from just numbers to giving reasons as to why we give that particular figure.</i></li> <li>Earlier we did give any statistical data to the donor agency. After leant the process of application of NGO - IDEAS Tool Box, <i>we are able to give accurate information with statistical data.</i></li> </ul>
<u>Focus on community perspective</u>	<ul style="list-style-type: none"> <li>Reporting to funding partners on the impact of the micro credit program basing on the <i>outcome realized by the beneficiaries</i> themselves.</li> <li>Reports will include <i>community assessments on improvements in their lives</i> rather than just project targets.</li> <li>With NGO-IDEAs tools, the organization is looking forward <i>to incorporate the results of people's assessment</i> in relation to the extent of achievement on the goals they set to the reports that [our organization ](...) is submitting to the funding partners.</li> <li>We shall use NGO-IDEAs tools to <i>collect data on changes in the community (SHGs)</i> and feed the logframe for reporting.</li> </ul>
<u>Other positive Effects</u>	<ul style="list-style-type: none"> <li>We have adopted it for monitoring and assessing the impact of our interventions in one WHH sponsored project and it is <b>helping not only in reporting to the Project Management but also to the Funding Agency as well with pre-defined time and activity schedule as per the project Objectives and in achieving the desired impact also.</b></li> <li>Quality enhancement and precise internal reporting.</li> <li>Outcome and impact analysis may be forwarded to the funding agencies indicating how the funds have been appropriated for the specific &amp; goal oriented causes.</li> <li><i>The documentation of survey results (PWR, PAG, SAGE) and the reflection report (product of PIAR) will provide the evidence that illustrates progress in achieving program/project outcomes and impacts of respective groups/individuals/communities supported.</i></li> <li>Yes an improvement to our internal reporting &amp; reporting to funding partners on outcomes &amp; impacts were surely improved due to the use of the toolbox. <i>Our management were very supportive in our application of NGO IDEAs toolbox to our reporting system.</i></li> <li>My role is not at practitioner level. The practitioners can sufficiently internally report.</li> </ul>
<u>Challenges</u>	<ul style="list-style-type: none"> <li>Particularly NGO Idea <i>needs much revisioning on the indicators and setting goal.</i> At CWS the general indicators where still followed by us therefore <i>outcome of NGO Idea is not used at internal reporting and reporting of funding partners.</i> We need to work to integrate the outcome of NGO Idea and donor communication while report complication.</li> </ul>
<b>5 WITHOUT ANSWER</b>	

**Q6: The NGO-IDEAs approach causes problems in the community.**

- If so, please describe the respective tool and the problems it causes
- How can these problems be overcome?

<u>Category</u>	<u>Answer</u>
<u>Well-being Ranking and the problems it causes</u>	<ul style="list-style-type: none"> <li>Particularly in PWR tool, members are hesitating to reveal their assets and they are not able to <b>build consent among the members on ranking.</b></li> <li>In the initial stage, to make understand about the <b>purpose of the each tool</b> may cause a problem, especially with PWbR - while categorizing the people.</li> </ul>
<u>Problems be overcome</u>	<ul style="list-style-type: none"> <li>Continuous motivation</li> <li>Though time consuming, <b>mutual concern among the community</b> needs to be built. Only after that, implementation of the tool to be started.</li> </ul>
<b>22 WITHOUT ANSWER</b>	

**Q 8: *key success – Why we say we have moved***

Category	Answers
<b>I. GENERAL</b>	
<u>Improved planning</u>	<ul style="list-style-type: none"> <li>• Participatory planning results into <b>success achievements</b> (on the part of ...)</li> <li>• The exercise of tools PWR helps to <b>set criteria to identify beneficiaries</b> for welfare support or finance assistance support programmes.</li> <li>• <b>Peoples' goal</b>, (not program managers' goal) has been established.</li> <li>• <b>Specific needs</b> have been identified.</li> <li>• <b>Goal oriented Plan of Action</b>.</li> </ul>
<u>Improved Reporting</u>	<ul style="list-style-type: none"> <li>• <b>Improved reporting by the groups</b>.</li> <li>• The <b>changes</b> as a result of loans received are <b>documented</b>.</li> <li>• <b>Systematic documentation</b> of the group profile and individual profile</li> <li>• Got a further understanding on input, output, use of output, outcome and impact. This has helped me to <b>report as per with the arena</b>.</li> <li>• The tool can show <b>the impact of the project on the beneficiaries</b> which will be <b>documented in the reports</b></li> </ul>
<u>Cooperation between NGO and CBO strengthened</u>	<ul style="list-style-type: none"> <li>• it promotes <b>strong relationship in between the NGO./CBO and the Primary stakeholders</b></li> <li>• With the use of tools, the <b>CBO and NGO experienced a productive discussions</b> and learned that dialogue or group discussions indeed are effective way of resolving conflicts and in moving the group forward to the achievement of their development goals</li> <li>• Helped <b>NGO and CBO to set a shared direction</b> for the next 3 years and the different roles they take.</li> </ul>
<u>Adaptation to PME System</u>	<ul style="list-style-type: none"> <li>• [Our organisation] (...) can now <b>work its logframe to NGO-IDEAs and report using PIAR</b></li> <li>• The engagement in NGO IDEAs <b>enhance our system of Monitoring and evaluation</b> which is outcome &amp; impact oriented</li> </ul>
<u>Assessment</u>	<ul style="list-style-type: none"> <li>• <b>Systematic assessment of the changes</b> as a group and as an individual member in S&amp;C program</li> <li>• <b>Over all monitoring of the group function</b></li> </ul>
<u>Dissemination</u>	<ul style="list-style-type: none"> <li>• We have rolled out the tools to 31 SHGs (SAGE – 11SHGs; PAG – 12 SHGs, 8 CLAs)</li> <li>• Ability to <b>expand networks to other service providers</b> as implementation.</li> </ul>
<u>Tools are impact steering<sup>24</sup></u>	<p>PWR (Participatory Wellbeing Ranking) - is useful in situational analysis; identifying vulnerable/target group, community needs and available resources; defining indicators for quality of life and wellbeing classification; and measuring changes in poverty/wellbeing situation. The tool can be used during assessment, designing/monitoring (baseline) and evaluation phases of the program life cycle.</p> <p>SAGE (Situational Analysis and Goal Establishment) - is relevant in individual/family impact steering programming as it measures individual/family situation and guides individuals/families in goals setting prior to joining/becoming a partner of a project/program. The tool is recommended for the use of self-help groups (SHG) at the village level during designing, monitoring, evaluation and transition phases of the program cycle.</p> <p>PAG (Performance Assessment of Groups) - is helpful in defining and measuring the long-term/sustainable direction of the SHG, COMSCA and even CBO.</p> <p>SAGE and PAG defined the goals of target individuals and groups in communities that are most important and impacting to them. These articulated goals can inform programming of appropriate interventions that will be most welcomed by target individuals/groups thereby ensuring participation and sustainability.</p> <p>The tools (PWR, SAGE and PAG) are impact steering as they enable communities, individuals and groups to realize their situation and make plans of action to improve their situation.</p> <p>Tools can monitor both quantitative and qualitative outcomes/impact</p> <p>The continues application (eg. Every 6 months) of PAG, SAGE and PWR (every 3 or 5 years) allows for easy monitoring of changes in individuals, groups and communities.</p> <p>Give stimulation to move forward specifically for poorest, poorer &amp; poor</p> <p>Scientifically &amp; participatory way of categorizing the people based on Wealth &amp; Well Being.</p>

<sup>24</sup> The feedback to the category “tools are impact steering” has been given by one single partner organisation.

	<p>Upgradation of the tool is based on the collective experience of the association and reflection of the impact.                  The usage of the tool provided guidance in developing change indicators for the target individuals/groups.</p>
<b>II. NGO AND STAFF</b>	
<p><u>Confidence in application / improved understanding, skills, ability</u></p>	<ul style="list-style-type: none"> <li>• Community facilitators adopted the tool and have gained <b>confidence to facilitate the process</b></li> <li>• <b>We are able</b> to apply NGO-IDEAs tools.</li> <li>• My impact evaluation <b>skills improved</b> with introduction to the tool.</li> <li>• Field level staff were able to <b>familiarize the exercise of tools of PWR &amp; SAGE</b></li> <li>• The tools contributed to a <b>learning process for the group and organization.</b></li> <li>• A thorough <b>understanding on the requirement of roles and responsibilities of the organisation</b> in S&amp;C program</li> <li>• A <b>space created</b> for individuals in the group and organisers in the organisation to <b>understand their strength and shortcomings</b></li> <li>• <b>Understanding</b> the impact of the S&amp;C program in the context of general socio economic situation</li> <li>• Got a <b>further understanding</b> on input, output, use of output, outcome and impact. This has helped me to report as per with the arena.</li> <li>• <b>learnt the process of application of tool box.</b> How to identify / classify the catogories, Facilitation skills, analysis process, documentation</li> <li>• The tools helped the people to make a systematic development in the agricultural activities in which they practice for a <b>successful implementation of agricultural activity</b> both for the people and <b>for the [our organization] (...)-NGO.</b></li> <li>• We appreciate and learn more impact monitoring and evaluation. We realize the level of our impact in our partners and the services that we do. We become <b>more analytical and people based.</b></li> <li>• We have learnt the <b>cost effective way of measuring the impact.</b></li> </ul>
<p><u>Other positive effects</u></p>	<ul style="list-style-type: none"> <li>• <b>Job satisfaction of facilitators.</b></li> <li>• It also continuously use in monitoring and innovating of strategies. It provided <b>greater participation of staff in decision making</b> related to the implementation and management of the project.</li> <li>• We have learnt the <b>cost effective way of measuring the impact.</b> As <b>primary stakeholders actively participate</b> in setting goals to measure their impact which is the <b>key success for achieving sustainable development.</b></li> </ul>
<b>III. THE CBOs/GROUPS</b>	
<p><u>Increased understanding, awareness and confidence</u></p>	<ul style="list-style-type: none"> <li>• <b>Increased understanding</b> on the need to solve their problems themselves (group members).</li> <li>• It gave a <b>deeper understanding of the NGO's role and their responsibility</b> to the stakeholders.</li> <li>• <b>Increased belief</b> of the beneficiaries (group members) on ... <b>their projects</b></li> <li>• it makes the participants <b>confident in achieving the goals;</b></li> <li>• Indicator in these tools helped them to <b>deepen their awareness on exploitative situation analysis, exploitative status analysis, exploitative structural analysis.</b> These had been <b>highlighted because of discussion on indicators, goals etc</b></li> <li>• It is a <b>self-awakening process</b> primarily for the stakeholders and then for the Project Management</li> <li>• A space created for <b>individuals in the group</b> and organisers in the organisation to <b>understand their strength and shortcomings</b></li> <li>• The community sectoral representatives <b>realized their situation in the light of the well-being categories and see the need for action to respond to the situation</b> eg. Referring the poorest households in their community to be the primary beneficiary of government interventions.</li> <li>• The use of PWR, SAGE and PAG tools <b>promote high awareness of development among individuals and groups</b></li> </ul>

<u>Empowerment and Participation</u>	<ul style="list-style-type: none"> <li>• Full <b>participation of the children</b> in coming up with their individual and group goals/indicators using the NGO-IDEAs tool (PAG, SAGE, PIAR) facilitated <i>clear implementation of children's planned activities and monitoring of changes</i> in the lives of the children that we work with.</li> <li>• It ensures <b>peoples' participation</b></li> <li>• Community Empowerment</li> <li>• The need for <b>community participation/empowerment getting strength</b> in (...) organisation.</li> <li>• Tools are participatory: <b>CBOs began to appreciate the importance of participation of each member</b> articulating what they want to achieve which increased their group participation and cooperation</li> <li>• <b>Tools are empowering</b>: The use of PWR, SAGE and PAG tools promote high awareness of development among individuals and groups</li> <li>• Groups can now <b>mobilize themselves</b> for purpose of NGO-IDEAs.</li> <li>• The exercise of tools <b>facilitates the participatory decision making process in the group</b>.</li> <li>• <b>Self determination and self initiative</b>.</li> </ul>
<u>Identifying their specific needs (through critical analysis)</u>	<ul style="list-style-type: none"> <li>• Now they are able to <b>identify their needs and how to solve these needs</b>.</li> <li>• These tools helped the members to <b>identify inbuilt weaknesses and strength and improvement within the individual, the organizations and the system</b></li> <li>• The tools contributed to a <b>learning process for the group and organization</b>. the groups were <b>able to identify their strengths and weaknesses and how they could turn them into successes</b>.</li> <li>• The members appreciated the use of the tools in the development processes as it helped <b>their critical analysis of their own situation that enabled them to plan in response to their desired goals</b>.</li> <li>• <b>Specific needs have been identified</b>.</li> <li>• Exercise of tool SAGE <b>motivates and encourages the members to identify their needs and set a goal and plan to attain the goal</b>.</li> </ul>
<u>Setting their own goals/activities</u>	<ul style="list-style-type: none"> <li>• The CBO <b>formulated the purpose, the vision and mission</b> for which their group is in existence in relation to the management of the water system</li> <li>• Groups have <b>redefined their objectives</b> on realisation of self and intended focus</li> <li>• Implementing groups use tools to <b>develop goals, objectives and activities</b> used in project proposal writing which are usually realistic and are funded</li> <li>• <b>Peoples' goal</b>, (not program managers' goal) has been established.</li> <li>• They are able to put forward their <b>goals and find way of meeting them</b>.</li> <li>• it leads the people to <b>determine their goals</b></li> </ul>
<u>Asses their own performance</u>	<ul style="list-style-type: none"> <li>• The group members are now able to <b>set their own goals and monitor them</b>.</li> <li>• The use of the tools have <b>encouraged the group to set goals</b> which they have not done in their personal life and see the <b>value of they themselves assessing the status of the goal they set</b>.</li> <li>• The group members today can <b>assess their own performance</b>.</li> <li>• The use of the tools provided the CBO with opportunities and chances to <b>regularly check and discuss the progress of their actions during regular meetings</b></li> </ul>
<u>Improved / diversified activities</u>	<ul style="list-style-type: none"> <li>• As a result of setting goals beneficiaries are <b>more consistent in saving</b> (regularly) in the selected groups.</li> <li>• The individuals and groups who underwent the process of SAGE and PAG became <b>more active/cooperative in their groups</b> and became <b>more purposive in changing their situations</b> for the better that some developed the habit of savings while some gave up their vices (responses from field validation)</li> <li>• The tools helped the people to <b>make a systematic development in the agricultural activities</b> in which they practice for a <b>successful implementation</b> of agricultural activity both for the people and for the PMD-NGO.</li> <li>• We have witnessed <b>diversification of adopted enterprises/projects</b> by individuals/groups.</li> </ul>

<u>Ownership of the development process</u>	<ul style="list-style-type: none"> <li>• Self govern themselves in many areas of development.</li> <li>• Self determination and self initiative.</li> <li>• The exercise of Tool SAGE motivates and encourages the group members to identify the needs, plan to access those needs and execute their strategies. In a way it make them to own their development process. (E.g. initiating collective income generation activity by mobilizing the fund sources from Kolping and Bank; Participation &amp; taking issue to the gramasabha.)</li> </ul>
<u>Others</u>	<ul style="list-style-type: none"> <li>• It is actually premature to say we have moved as the use of the tools came as we are planning a new project. The new project started as the NGO Tools project is ending. Nevertheless we are committed to using the tools for the next four years until we complete the project. It is only then that a more definitive statement might be made of how much we have "moved".</li> </ul>
3 WITHOUT ANSWERS	

**Q8.2: *key challenges – What you still need to overcome***

Category	Answers
<b>I. NGO Level</b>	
<u>Adequate (financial, time, qualified staff)resources</u>	<ul style="list-style-type: none"> <li>• Time consuming to be re-arranged.</li> <li>• <b>Time</b>-The groups usually meet for around an hour so getting them to wait some more is sometimes difficult.</li> <li>• Dealing with disabilities brings out emotions from participants and they can talk for very long.</li> <li>• The selected SHG groups for tool application require <b>more time and attention for the explorative sessions</b></li> <li>• <b>Time consuming</b></li> <li>• It is a little bit <b>time consuming</b>: One has to maintain the sequences chronologically; It demands regular contact with the stakeholders; It requires active participation of all the stakeholders at the same time in the same way.</li> <li>• Investment of <b>additional time /working hours/Manpower</b>.</li> <li>• <b>Additional funds for training and resources required</b></li> <li>• <b>Additional fund for training and Resource Center</b></li> <li>• <b>Limited number of staff with appropriate knowledge</b> for rollout who might be assigned to other responsibilities as a result of organizational restructuring</li> <li>• <b>Separate trained staff</b> should be there to collect data and maintain it periodically</li> <li>• The desirable qualitative changes require a <b>prolonged intervention in the group</b></li> <li>• EA Regional Consultant does not have enough time &amp; finances to conduct onsite technical support visits.</li> </ul>
<u>Analysis and data documentation</u>	<ul style="list-style-type: none"> <li>• <b>Data analysis</b> – we have just started and need to do more.</li> <li>• <b>Inadequate skills on data entry &amp; analysis using GrafStat</b></li> <li>• <b>Data: - analysis, -attribution, -documentation</b></li> <li>• The NGO tools focus on outcomes but there is <b>still a real need to also monitor inputs and outputs</b>. We are implementing an Integrated Rural Development Program with various components. <b>Our key challenge is how to systematically store and retrieve the data that we generate for various components.</b></li> <li>• We are trying out GrafStat but are concerned about losing data and not having anyone we can easily ask about it.</li> <li>• <b>Process and output documentation of the tools</b> is one of the challenges that we need to overcome because of the limited staff. Volunteers were maximize in order to update data encoding.</li> <li>• <b>PIAR Analysis and documentation</b></li> <li>• <b>Quality assurance on data collected</b></li> </ul>

<u>Adaptation, mainstreaming and harmonising tools</u>	<ul style="list-style-type: none"> <li>• <b>Mainstreaming the use of the tools to all of the projects</b> being implemented by [our organization] (...)</li> <li>• Review of facilitation guides and also indicators to <b>include what is already happening</b> at the SH approach concept.</li> <li>• In my project I have activity based tacking mechanism whereas <b>the general indicators used in the NGO Idea not applicable to all the target community</b>. this more specific to Saving and credit group.</li> <li>• <b>In [our organization] (...)for right based programs this has hardly any use.</b></li> <li>• This is <b>more donor driven tool</b>, whereas at [our organization] (...)for each project <b>donor define different format for impact monitoring.</b></li> <li>• <b>In [our organization] (...)I lack in integrating it to [our organization] (...)monitoring format.</b></li> <li>• The use of NGO idea application is <b>not taken up in donors communication</b></li> </ul>
<u>Management support</u>	<ul style="list-style-type: none"> <li>• <b>Management support</b> in allocating manpower and budget for organizational rollout</li> <li>• The technical persons and senior officials still need to be convinced.</li> </ul>
<b>II.CBO/Member Level</b>	
<u>Members attitudes / beliefs / expectations (cultural context)</u>	<ul style="list-style-type: none"> <li>• Only after <b>repetitive motivation and exercise</b> the members were able to accept and contribute the data required as per the tools.</li> <li>• <b>Attitude change from believing in handouts to guiding beneficiaries towards self-reliance</b> (on the part of project owners).</li> <li>• <b>Beneficiaries to be open to their problems and identification</b></li> <li>• <b>Mind set of the people and revealing their assets.</b></li> <li>• The people have the mind set that the <b>revelation of their assets may block the welfare benefits</b> provided by government/development agencies. The process of breaking through the mindset is difficult and time consuming.</li> <li>• Some thought that this was a difficult work or task</li> </ul>
<u>Consolidation of divers realities and goals</u>	<ul style="list-style-type: none"> <li>• <b>Expectation of the community</b> can't be address in one project format</li> <li>• Setting of uniform goals ...community goals ...</li> <li>• Multiple influences such as caste, political affiliation etc <b>hardness the process of consensus building.</b></li> <li>• <b>Weightage</b> is very much <b>subjective to the each concerned group</b>. It needs to be standardized when PIAR is used. (eg. Voting rights execution for interior villages &amp; road side villages)</li> <li>• The social realities, economic problems and gender issues prevailing in the family and the village have not fully complimentary to the goal achievement</li> </ul>
<u>Low education level - illiteracy</u>	<ul style="list-style-type: none"> <li>• <b>Low illiteracy level of group members</b> inability to keep ...rewards.</li> <li>• <b>Illiteracy problem</b> thus the level of understanding is low.</li> <li>• Low level understanding of the members due to <b>illiteracy and rural background.</b></li> <li>• <b>Proper education</b> on this regard is highly essential to collect valid</li> </ul>
<u>Skills and confidence</u>	<ul style="list-style-type: none"> <li>• <b>More facilitation skills</b> in introduction of the tools</li> <li>• <b>Confidence of field staff and group leaders to facilitate the assessment process on their own.</b></li> </ul>
<u>Other challenges</u>	<ul style="list-style-type: none"> <li>• It is still a challenge <b>whether to involve NGO IDEAs tool before planning</b> (for new projects as it takes immense time to build the mutual concern) <b>or after the planning</b></li> <li>• <b>Simplifying the tools</b> especially to the children because it needs more time and processes for them to understand than the adults.</li> <li>• To <b>overcome the many objective obstacles along with maintaining the subjective preparedness of the members</b> is a real challenge</li> <li>• A complete <b>involvement and participation of the CBOs</b> in the NGO IDEAs tools process.</li> </ul>
<b>2 WITHOUT ANSWERS</b>	

**Q9: What are your main suggestions for the follow-up to the funding partners?**

<u>Category</u>	<u>Answers</u>
<u>Adequate resources</u>	<ul style="list-style-type: none"> <li>• Financial support – staff time and transport</li> <li>• Funding partners should earmark financial commitments to support the concept.</li> <li>• More resources should be earmarked for the EA Regional Co-ordinator.</li> <li>• Financial support to roll out the tools</li> <li>• To cover costs needed to engage the idea more in the project areas</li> <li>• ensure fund allocation for M&amp;E</li> <li>• fund allocation to support staff participation to future NGO IDEAS collaboration</li> <li>• fund allocation to support organizational rollout</li> <li>• Adequate resources should be included in project budgets for the conduct of the surveys and documentation as well.</li> <li>• Use of these tools as process of learning to the community and a instrument to assess the implementing organisation's performance. It requires more human, finance resources and sufficient time.</li> <li>• The funding partners may ask the implementing partners to include NGO IDEAs tools in the project monitoring system and may also support for additional expenses like training to the associations</li> <li>• Minimum Financial support to promote this;</li> <li>• To support the implied cost in applying the NGO-IDEAs tools in the projects they supported.</li> </ul>
<u>Continued technical support, experience sharing and coordination</u>	<ul style="list-style-type: none"> <li>• Technical support: Facilitation of the regional Co-ordination to providing this support.</li> <li>• Support for technical backstopping</li> <li>• Offer technical guidance to implementing groups</li> <li>• Continuous coordination to help us sustain our efforts. We need both moral and technical support</li> <li>• This project involves the partners in the process ultimately stabilize, strengthen the Savings and Credit management activity and sustain the group activity in the long run. Partners are still in different stages of tool application. At this point they may require support hand to run the project successfully. So the follow-up to the funding partners is desirable.</li> <li>• Providing Technical Support.</li> <li>• Conduct national review meetings.</li> <li>• There is need for further testing of the tools to the groups and other new groups for learning and sharing.</li> <li>• Further review and adaptation of the tools to capture impact in disability interventions.</li> <li>• Enough flexible in application of tool box. Because we are in the process of practicing it in the field</li> </ul>
<u>Dissemination</u>	<ul style="list-style-type: none"> <li>• Dissemination of information</li> <li>• Provide partner NGO's with the final copy of the tools</li> <li>• Dissemination of training/resource materials.</li> <li>• Sharing of reports on a quarterly basis.</li> </ul>
<u>Including tools in project proposals</u>	<ul style="list-style-type: none"> <li>• Monitoring, evaluation and reporting system using NGO-IDEAs toolbox is a must in every projects that they will approve.</li> <li>• Keeping this tool Box as in built in the Project Proposal as compulsion for Project Formulation, Planning , Monitoring and Evaluation also;</li> </ul>
<u>Capacity building</u>	<ul style="list-style-type: none"> <li>• More trainings should be organised especially on data entry &amp; analysis.</li> <li>• Support ToT training for more staff locally.</li> </ul>
<u>Others</u>	<ul style="list-style-type: none"> <li>• We like the use of participatory methods and especially think that the tools really capture participation and allow for reflection as well.</li> <li>• Invite the senior officials along with CEO and orient them about the NGO IDEA approach and funding partners also need to give importance for the people's views.</li> <li>• Project amendments should be easily undertaken if we find that survey results show a need for design amendments.</li> <li>• Please don't suggest project based impact monitoring tool</li> </ul>
3 WITHOUT ANSWER	

**Q10: What are your main suggestions for the follow up to the NGO-IDEAs partners in developing countries / Global South?**

<b>Category</b>	<b>Answers</b>
<u>Exchange and documentation of experience / continued regional coordination/support</u>	<ul style="list-style-type: none"> <li>• Continued sharing of experience and leanings.</li> <li>• To continually be connected even after the project term of NGO-IDEAs and continue the sharing of experiences and lessons learned in the use of the various participatory impact monitoring tools.</li> <li>• We need <b>continuous communication</b> for the exchange of our experience</li> <li>• <b>Networking</b> – sharing, exposure visits, trainings</li> <li>• <b>Exposure visits</b> for partners should be organised and facilitated.</li> <li>• Communication through <b>joint email address &amp; website</b> should be maintained.</li> <li>• <b>venue</b> for sharing experiences and learning from other practitioners</li> <li>• <b>Annual international review meetings</b> to share success &amp; challenges</li> <li>• <b>Meeting among the partner organizations in developing countries</b> to discuss new gains and new experiences in applying the tools.</li> <li>• We suggested that <b>partners continue to meet at least once a year</b> to allow us to exchange notes on what we have learned and how we can learn from each other. When we went to India we discussed whether we could look at the tools specifically as applied to agricultural projects, children, women etc. We have not had really a chance to discuss whether there are peculiarities in different sector or project types.</li> <li>• Continue exchange of learning through e <b>group and implementation of the once a year meeting</b> of the eight (8) partners in the Philippines.</li> <li>• <b>Co-ordination of East African Partners should be maintained.</b></li> <li>• In south also <b>different partners are in different stages of tool application</b> in different sectors. PIAR - the tool application and the technical support like software adoption in tool application for result assessment and analysis may require <b>help from the Regional level.</b></li> <li>• <b>To develop a consortium.</b> Coordination with the <b>Resource Centers.</b></li> <li>• <b>Documentation of experience and sharing through a centralizes place</b> (co-ordination).</li> <li>• <b>Monitoring/documentation of further tools enhancement</b> by practitioners (successes and failures if any).</li> </ul>
<u>Adaptation, integration and mainstreaming of the tools</u>	<ul style="list-style-type: none"> <li>• <b>Further adaptation of the Disability and development sector tools</b> to capture impact.</li> <li>• <b>Adopting this as firstly for monitoring and evaluation; then for Project Formulation and implementation</b> ; Making the Management more and more conversant of the idea through discussion, Seminar, Workshop , Consultative seminar etc.; Going through the Publications and success stories on Other practicing NGOs .</li> <li>• Kolping should <b>mainstream the tools in our M&amp;E</b> so that we shall become an <b>example to other projects</b></li> <li>• It should be <b>incorporated in the routine/ ...follow-up programme</b></li> <li>• It <b>integrates of these tools in implementation of projects</b> will help the organization to enhance the performance.</li> <li>• Try to consider the <b>NGO IDEAs tools as part and parcel of the monitoring and evaluation system</b> and not as a separate entity</li> <li>• Futher trainings and <b>widening the use of the tools to other Branches for more implementation and capturing impact of the interventions.</b> ( 4 branches at an extension)</li> <li>• Its good to learn the idea of impact monitoring but this needs to be used as per the need of the reporting format. the same tool can't be applied for different thematic area. Women Atrocities, Violence, Adivasi and dalit rights on FRA and policy change etc.</li> </ul>
<u>Capacity building</u>	<ul style="list-style-type: none"> <li>• To <b>build capacity of resource persons</b> in tool application</li> <li>• <b>Futher trainings</b> and widening the use of the tools to other Branches for more implementation and capturing impact of the interventions. ( 4 branches at an extension)</li> </ul>
<u>Others</u>	<ul style="list-style-type: none"> <li>• Review the current tool and after critical assessment and suggestions.</li> <li>• Customise and finalise the tool, release the final version</li> <li>• Practice makes perfect. Because there are lot things to learn, it will possible when we practice in the field.</li> </ul>
4 WITHOUT ANSWERS	

**Q11: What are your main suggestions for the follow up to the groups/CBOs who have applied the NGO-IDEAs approach?**

<b>Category</b>	<b>Answers</b>
<u>Constant encouragement, support and follow up</u>	<ul style="list-style-type: none"> <li>• To ensure <b>continued provision of guidance and encouragement</b> on the application of the tools.</li> <li>• <b>Encourage them</b> on their day to day activities.</li> <li>• <b>To keep with the spirit and practice.</b></li> <li>• There is a need for a <b>constant follow up and encouragement</b> to our CBO partners in order for them not to forget their plans for continuous impact monitoring and evaluation</li> <li>• <b>Continued accompaniment and facilitation</b> of application process</li> <li>• <b>Constant follow-up</b> of the groups and measuring progress</li> <li>• <b>Continue to assist them</b> till they got fully involved.</li> <li>• <b>NGOs need to extend support to CBOs</b> till they became confident of applying the tool independently</li> <li>• <b>Continue in assisting the CBOs in applying the toolbox</b> especially in documentation of the processes and output</li> <li>• <b>To internally visit</b> one another for more learning processes/purposes</li> <li>• <b>Group to group experiential learning visits.</b></li> <li>• <b>Inter group exchange of ideas and experiences</b> on the impact of intervention through tools testing</li> <li>• More <b>Capacity building</b>; <b>Peer learning</b> – for others to learn from them and exposure visits</li> <li>• <b>More skills about NGO-IDEAs tools.</b></li> <li>• <b>Build the capacity of the CBO Leaders</b></li> </ul>
<u>Continuous application, adaption and mainstreaming of tools</u>	<ul style="list-style-type: none"> <li>• CBOs' continues application of tools</li> <li>• <b>To incorporate the reflection process and group discussion during their meetings</b></li> <li>• <b>To annually do an assessment or survey to track the progress on the extent of achievement of each goal</b></li> <li>• <b>Continuous testing of the tools</b> among the groups and generating more learning approaches.</li> <li>• Any project or program of an organisation requires a <b>systematic and more scientific self evaluation</b> and monitoring system for the effective program implementation. It should be <b>developed within the system as a regular mechanism</b>. We need to practice it, continue it and try to make it as an inbuilt system.</li> <li>• <b>Adopt and practice for Project Activities monitoring and Supervision ;</b></li> <li>• <b>Use the result in Reporting to NGO concerned and training to own staff members so that they can disseminate it to other local NGOs</b></li> <li>• <b>Empowering the groups</b> to ensure that <b>the tools tested be part of the group continuous monitoring tools for impact.</b></li> <li>• If they do the <b>PWR, SAGE and PAG exercise in regular intervals</b> (PWR once in 3 year, SAGE &amp; PAG every year) can understand and aware of their development and growth. I can also <b>help them to make a productive decision.</b></li> <li>• Sustain documentation and reporting</li> <li>• Documentation of each activity</li> <li>• Facilitation for achievement</li> <li>• Identification/overcoming challenges</li> <li>• Coordination &amp; Networking</li> <li>• <b>To try to evolve upscale indicators as per your need and situation</b></li> </ul>
<u>Key community facilitators / leaders</u>	<ul style="list-style-type: none"> <li>• Identification of <b>Key community facilitators</b></li> <li>• Like I stated above, [our organization] (...)will continue to use the tools for the next three years. Among our <b>key challenges is the lack of literate leaders</b> who can document the survey results themselves.</li> </ul>
<u>Transfer of ownership</u>	<ul style="list-style-type: none"> <li>• <b>Transfer the ownership</b> to the leaders and to the federations.</li> <li>• <b>Transfer of ownership</b></li> <li>• Participation, involvement and commitment in the application of tool box.</li> </ul>

<u>NGO continuous monitoring of CBOs</u>	<ul style="list-style-type: none"> <li>• Continue monitoring the progress of the group/CBOs using the tools and provide feedback/learning report to the secretariat of NGO-IDEAs.</li> <li>• NGOs monitoring, analysis and reflection of progress by CBOs</li> <li>• NGOs documentation of tools' impact to CBOs</li> <li>• M&amp;E application required to them.</li> </ul>
<b>4 WITHOUT ANSWER</b>	

**Q12: To what extent have you been able to improve the practice of participatory impact oriented steering in the area of micro-finance (savings and credit) further in 2009 to 2011?**

<ul style="list-style-type: none"> <li>• Beyond Yes or No answers, we developed coloring / grading method (sub indicators for each indicator) for SAGE. For example I am working for safe drinking water as follows             <ul style="list-style-type: none"> <li>- Within the house (Green)</li> <li>- Within the veranda (blue)</li> <li>- Within 1/2 km (yellow)</li> <li>- Within 1 km (red)</li> </ul> </li> <li>• Both our partners and CBOs make use of the tool to record their progress for future reference as well as to assess their achievements of different goals.</li> <li>• The process of tool application has provided a space through discussions to each individual member in the group.</li> <li>• The whole process of tool application assessment provided by the members through a methodology of discussion and exploration in the group associated with organisers is an effective way of participatory evaluation.</li> <li>• The community action plan at each group is a regular self monitoring method introduced by the project.</li> <li>• Our working area is savings and credit sector. we always promote participatory methods . The group itself takes decision in sanction of internal loans, anything that group require they write a resolution and pass it in the groups meeting. Thus savings and credit program created lot of impact on the women.</li> </ul>
<i>Specific question directed towards the 9 Indian partners who participated in NGO-IDEAs I.</i>

### Annex 3: Tables presenting detailed evaluation of the scoring responses.

**Table 4: Utility and Effects on the Partner NGO (Part1) - [N26]**

Variable:	Management decisions oriented towards outcome and impact.	Increased staff competency, knowledge and skills.	Future improvements of internal reporting and reporting to funding partners.	General utility of NGO-IDEAs to outcome and impact monitoring.
Scale:				
Not at all	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Little	2 (8%)	0 (0%)	1 (4%)	1 (4%)
Fairly	6 (23%)	7 (27%)	5 (19%)	7 (27%)
Sufficiently	11 (42%)	16 (62%)	11 (42%)	12 (46%)
Highly	7 (27%)	3 (11%)	9 (35%)	6 (23%)

**Table 5.1: Utility and Effects on the Partner NGO (Part2) - [N26]\***

	The NGO-IDEAs approach contributes to...				
Variable:	... learning from experience	... avoiding failures.	... accountability towards donors.*	... identifying the very poor households.	... identifying the achievement of goals.
Scale:					
Fully disagree	0 (0%)	2 (8%)	0 (0%)	0 (0%)	0 (0%)
Mostly disagree	0 (0%)	1 (4%)	0 (0%)	0 (0%)	0 (0%)
Partly disagree / agree	3 (12%)	4 (15%)	2 (8%)	4 (15%)	1 (4%)
Mostly agree	12 (46%)	16 (62%)	12 (48%)	6 (23%)	9 (35%)
Fully agree	11 (42%)	3 (11%)	11 (44%)	16 (62%)	16 (62%)

\* accountability towards donors = [N25]

**Table 5.2: Utility and Effects on the Partner NGO (Part2) - [N26]**

	The NGO-IDEAs approach contributes to...			
Variable:	... adopting action plans to beneficiaries' situation and needs.	... greater satisfaction, responsibility, commitment of NGO staff.	... higher accuracy and reliability than traditional monitoring systems.	... improve future project proposals.
Scale:				
Fully disagree	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Mostly disagree	0 (0%)	0 (0%)	1 (4%)	1 (4%)
Partly disagree / agree	1 (4%)	5 (19%)	6 (23%)	1 (4%)
Mostly agree	12 (46%)	15 (58%)	10 (38%)	12 (46%)
Fully agree	13 (50%)	6 (23%)	9 (35%)	12 (46%)

**Table 6: Utility and Effects on the Partner NGO (Part3) - [N26]**

Variable:	The NGO-IDEAs approach...			
	... consumes more time than we can afford	... increases the beneficiaries' expectations towards the NGO	... is hard to make compatible with your project planning.	...causes problems in the community.
Scale:				
Fully disagree	4 (15%)	5 (19%)	8 (31%)	14 (53%)
Mostly disagree	0 (0%)	7 (27%)	10 (39%)	8 (31%)
Partly disagree / agree	15 (58%)	8 (31%)	4 (15%)	1 (4%)
Mostly agree	3 (12%)	4 (15%)	4 (15%)	1 (4%)
Fully agree	4 (15%)	2 (8%)	0 (0%)	2 (8%)

**Table 7: Utility and Effects on the CBOs (Part1) - [N25]**

Variable:	Target groups obtain increased benefits from the project.	The additional benefits justify the additional expenditure and effort.	CBOs/groups can manage their community projects better.	Learning from experience in the group / CBO is promoted.
Scale:				
Fully disagree	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Mostly disagree	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Partly disagree/agree	6 (24%)	9 (36%)	1 (4%)	1 (4%)
Mostly agree	11 (44%)	10 (40%)	15 (60%)	15 (60%)
Fully agree	8 (32%)	6 (24%)	9 (36%)	9 (36%)

**Table 8: Utility and Effects on the CBOs (Part2) - [N25]**

Variable:	Members are taking better part in decision making.	Members are being motivated to achieve their goals.	Individual self-determination to overcome poverty / discrimination strengthened.
Scale:			
Fully disagree	0 (0%)	0 (0%)	0 (0%)
Mostly disagree	0 (0%)	0 (0%)	0 (0%)
Partly disagree/agree	2 (8%)	0 (0%)	4 (16%)
Mostly agree	8 (32%)	12 (48%)	10 (40%)
Fully agree	15 (60%)	13 (52%)	11 (44%)

**Table 9: Utility and Effects on Indian Partners, participating in NGO-IDEAs since 2004 - [N6]**

Variable:	Extent of further improvement in the practice of participatory impact oriented steering in the area of micro-finance	Extent NGO-IDEAs tools contributed to increased satisfaction, benefit and involvement of the SHGs	Variable:	Extend the NGO-IDEAs approach contributes to finding new answers to challenges in savings and credit
Scale:			Scale:	
Not at all	0 (0%)	0 (0%)	Fully disagree	0 (0%)
Little	0 (0%)	0 (0%)	Mostly disagree	0 (0%)

Fairly	3 (50%)	2 (33%)	Partly disagree /agree	1 (17%)
Sufficiently	3 (50%)	4 (67%)	Mostly agree	3 (50%)
Highly	0 (0%)	0 (0%)	Fully agree	2 (33%)

## Annex 4: Publications

In order further to document and share the results of NGO-IDEAs, the following publications have been released:

- **NGO-IDEAs Impact Toolbox**  
 The Impact Toolbox describes simple tools for participatory planning and monitoring of grassroots' projects. It is designed to enable NGOs, groups and group members to steer a project to enhance positive outcomes or impacts, and reduce negative ones.
- **NGO-IDEAs Tiny Tools for Impact Assessment**  
 The "NGO-IDEAs Tiny Tools of Impact Assessment" present easily applicable tools, which help to assess changes (outcomes and impacts) and its causes with only one single application. They can be used for external evaluation as well as for self-assessment of projects.
- **"Monitoring Self-Effectiveness": A Manual to Strengthen Outcome and Impact Oriented Project Management**  
 The Manual intends to support an organisation to focus its planning, monitoring and evaluation procedures towards increased outcome and impact orientation.
- **"How do they do it? – Civil Society Monitoring Self-effectiveness": An NGO-IDEAs documentation of field experience**  
 The publication presents descriptions of examples of outcome and impact analysis, which illustrate to staff of development organisations how outcome and impact assessment can be implemented and used in different ways.
- **NGO-IDEAs GrafStat Guide**  
 GrafStat is a simple and helpful software which can be used by development organisations to prepare their monitoring data for analysis. This guide focuses on applications and examples of GrafStat relevant for NGO-IDEAs.

Download URL: <http://www.ngo-ideas.net/publications/>.