# Towards Evaluation for Everyday Use!

Report on the pilot phase

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# Summary

In 2009 the Finnish Service Centre for Development Cooperation KEPA commenced the pilot project *Evaluation for everyday use*. The project is part of the organisational development service offered by KEPA to its member organisations and its objective is to support organisations that carry out development cooperation and global education work in developing their evaluation activities. Through an open call for participation, five organisations joined the project in 2009 and five others joined in 2010. The *Evaluation for everyday use* project did not present ready-made approaches to evaluation; rather the aim was to support the organisations' own development in the so-called zone of proximal development.

The developmental project was constructed of five workshops held in each organisation. In the workshops we analysed together the history of evaluation in the organisation and the strengths and challenges of its current operations and developmental tasks, and then selected one developmental task and worked on it together. The selected developmental tasks included different types of joint guidelines, monitoring tools and programme-level indicators. Expanding monitoring and evaluation from development cooperation projects to cover the operations of the whole organisation was a common developmental task that was supported by joint developmental workshops between the different parts of the organisations and by their joint work. Cooperation with Southern partners and the exchange of evaluation information also emerged often as a developmental task. The Logical Framework Approach (LFA) planning, monitoring and evaluation tool commonly used in development cooperation was seen as a good method in some organisations, whereas in other organisations it was felt that the LFA tools were difficult and they were actively looking for alternatives. The *Evaluation for everyday use* project made a start in the developmental work and one of the most important results of the project to emerge is the need to adopt a model of working collectively. The *Evaluation for everyday use* activity is continuing as part of KEPA's services.

# Contents

# Introduction – Evaluation for everyday use!

Evaluation has been a hot topic in Finnish civil society organisations in recent years. There has been a feeling that the requirements have increased from the Ministry for Foreign Affairs, the main funder for development cooperation, and there is more pressure on the organisations to increase monitoring and evaluation activities. The planning and implementation of evaluation has often been felt to be difficult and even distressing. Evaluation has been seen as something that requires specialist knowledge and substantial resources. Can evaluation become an everyday activity?

The Finnish Service Centre for Development Cooperation KEPA took on this challenge and implemented the pilot phase of the *Evaluation for everyday use* project with ten organisations in 2009-2010. The objective of the project was to make evaluation more of an everyday process and to start a collective learning journey with Finnish organisations working in the field of development cooperation. The purpose was to analyse together what is the current state of evaluation in the civil society organisations, what kind of challenges it involves and how it could be improved.

The objective of the developmental project was to develop, together with the organisations, useful evaluation methods for organisations working in development cooperation, to strengthen the evaluation know-how of the organisations, and to support the use of evaluation in the organisations' learning and operational development.

The project was not about providing the organisations with consultancy support by evaluation professionals. Neither KEPA – nor others – have ready-made answers or system packages to give for evaluation. As the umbrella organisation for almost 300 organisations working in development cooperation, KEPA wanted to dive into the everyday life of the organisations and to support collective developmental work. In earlier years KEPA has already been involved in coordinating a working group on the evaluation of the effectiveness of partnership organisations, supported the evaluation mentoring British consultant Max Peberdy provided to member organisations, and has annually organised general training on the monitoring and evaluation of development cooperation work.

Each one of the ten organisations that participated in the project is different. They all have their own history, mission and resources. The objective of the project was to support the organisations in perceiving their *zone of proximal development*. The zone of proximal development can be seen as a kind of future ground which has many

possible paths that can be taken – not as a pre-determined level that must be reached.[1] In workshops facilitated by KEPA's staff, we worked out together what would be the next important evaluation step for each organisation and how it could be taken.

In the *Evaluation for everyday use* project the initiative was with the organisations. The staff and volunteers of the organisations discussed things together, identified developmental needs and implemented developmental ideas; wrote guidelines and prepared indicators. The developmental work carried out alongside everything else – such as the actual writing work – may not have been as efficient and systematic as if it had been produced by external consultants. However, the process left the organisations with a common experience and an understanding; the shared pain and joy of creating something. In addition to supporting the developmental processes of individual organisations, the project also organised two joint seminar days for all the participating organisations which enabled the sharing of experiences and ideas between the organisations.

The *Evaluation for everyday use* project supported organisations in their own development endeavours and taught KEPA about developing the organisations. The project also produced unique research material for a research project at the University of Helsinki Institute of Development Studies[2]2, where the research topic is broadly the role of civil society organisations in development cooperation and the relationship of individual organisations to the international system. More than one hundred hours of discussion material was collected during the *Evaluation for everyday use* project, which provides a new type of information about organisational challenges in general and about evaluation in particular. The principle behind the research project was to create an authentic dialogue between the people working on a practical level and academic research.

This report does not describe in detail the individual developmental processes of the pilot organisations that participated in the project and the discussions that took place. The purpose of the report is to bring out, based on the developmental projects, the common challenges related to evaluation and the solutions developed in the projects for more general use. The report also describes the method of the *Evaluation for everyday use* project which can also be used by organisations to develop themselves.

1 Engeström & Sannino 2010, 21.

2 The research project is funded in 2008-2011 by the Academy of Finland and is directed by Juhani Koponen, Professor of Development Studies. See Kontinen 2009; Holma and Kontinen 2011. Articles based on the material will be written for international publications in the coming years.

# Evaluation in development cooperation and civil society organisations

Evaluation has been an important part of the development cooperation project cycle for decades. Evaluation usually refers to the mid-term and final evaluations conducted by external evaluators. Development cooperation evaluation is guided by the evaluation criteria of OECD's Development Co-operation Directorate, which define the general areas for evaluation: relevance, effectiveness, efficiency, impact and sustainability. The criteria for high-quality evaluation also include the use of measurable indicators which make it possible to monitor changes.

Unlike in bilateral projects, evaluation has not always been a systematic part of the project cycle in the work of civil society organisations. Limited resources have made it difficult to commission external evaluations before, during and after a project. Evaluation by small volunteer organisations has mainly consisted of self-evaluation in the organisation.

The partnership organisations that receive programme support from Finland's Ministry for Foreign Affairs have in recent years systemized their evaluation work, and project-level monitoring and evaluation have become an everyday activity for them. A partner organisation evaluation in 2008 revealed, however, that the monitoring and reporting systems still need to be developed. The new guidelines for partner organisation programme support in 2011 still emphasize that the organisations should have systems for monitoring and evaluation, and that they should define clear and measurable indicators to make it possible to evaluate the results and objectives of the programme.

Easier said than done? Everyone involved in development cooperation surely agrees to some degree that it is important to know whether there is any benefit from the work. Nevertheless, evaluation terminology, its common ideal models and criteria can easily continue to live a life of their own which is removed from practical work, unless they are correlated to the everyday activity of the organisations and its framework conditions. This report explains what kind of practical possibilities and difficulties organisations have in developing their own monitoring and evaluation systems.

## New directions in the evaluation of development cooperation

Internationally there has been a great deal of discussion about the evaluation of development cooperation in recent years. International organisations like the World Bank and UNDP have been calling for results-based management and the evaluation linked to it. In this approach it is important that the strategic objectives and the results of the programmes are mutually harmonious and that reliable measurement and monitoring systems exist to follow the programmes and projects. The basic principle is that the work is continuously monitored in relation to the results pursued, and that the information gained enables learning and the corrective measures possibly required. In most organisations the basis for results-based monitoring and evaluation is the Logical Framework Approach (LFA) model or different types of strategic planning models.

Another increasingly prominent viewpoint internationally has been that development policy decision-making should be evidence-based. In Britain there have even been calls for an evidence-based revolution in development policy. This kind of thinking is looking for models from medical science, for example. The goal is to know what kind of projects and programmes – interventions – work, and to distribute resources based on this information. Evaluation plays a central role in getting the evidence.

But what is worthy evidence and how is it obtained? There has been a heated debate about evaluation research methodologies. The "with intervention - without intervention" medical science research model implemented according to the principles of empirical research has been raised as a new miracle cure in the discussions. There is a belief that with this kind of empirical evaluation based on random sampling, it is possible to get unbiased information about real impacts. Empirical research design and the correct use of statistical methods aim to ensure the reliability of the data production and a valid attribution. Attribution means that it is possible to show in the evaluation which part of the observed change is specifically caused by the project. In addition to methodological challenges, there are ethical issues connected with empirical evaluation. For example, how to define who belongs in the beneficiaries and who in the control group that is not involved in the intervention?

Participatory evaluation has been viewed as a counter-balance to the empirical research design. In this method the most important factor in the production of evaluation data is the experience of the participants and the beneficiaries, and their own analysis about the change that has taken place in their life situations. Instead of statistical research designs, participatory evaluation emphasizes listening to the voices of the beneficiaries.

Civil society organisations in particular have criticised both results-based and empirical evaluation. In development cooperation the work takes place in a constant-

ly changing environment and its objectives are often linked to changes in attitudes, practices and power relations that are difficult to measure. Often the change is not linear and is influenced by many interconnected processes. Among the civil society organisations there has been a move to search for new approaches to evaluation based on systems and complexity theories.

Whatever the evaluation methodology is, it is increasingly common to see the terms ***theory of change*** or program theory[3] in the discussions about evaluation. Evaluation based on the theory of change starts with identifying the thinking behind a project or a programme about what kind of change is desired and how it is expected to take place. The theory of change builds a bridge between the activities and the desired results. The theory of change often remains hidden and organisations may have many different theories of change. In a workshop of ten major international organisations like Oxfam and ActionAid organised in 2009[4], there was a discussion about what the jointly defined objective of their advocacy work "progressive social change" and striving towards it meant in practice to the different organisations. Social change could be seen, for example, as "the unplanned consequence of individuals searching for their own happiness", "the result of development in information and technology", "a consequence of changing beliefs, ideas and values" or "through deliberate joint action". The different views about the source of social change influence what kind of projects and activities are implemented to achieve this change.

## Evaluation opportunities and challenges in civil society organisations

The discussions about the trends in evaluation methods – both in Finland as in the rest of the world – can easily remain as internal debates between the academic professionals of the evaluation world, far removed from the daily reality of the organisations doing the practical work. Evaluation methodology know-how in the organisations is not, nor can it be, central in the same way. Instead of methodological questions, the discussions in the organisations are more about how to utilise and develop the limited time, financial and skill resources available.

For the organisations one central discussion has been about the motives behind evaluation – why is evaluation conducted at all? This has often been about counter-

3 See for example White 2009.

4 Shutt (2009). Available at: http://onlinelibrary.wiley.com/doi/10.1111/j.2040-0225.2009.00003_2.x/pdf

posing accountability and learning. Evaluation is often carried out in order to show the funder – in Finland's case the Ministry for Foreign Affairs – that the funds have been spent on the things they were meant for and that the desired results have been achieved.

In the case of evaluation for accountability motives, there is typically a need to prove success and to show things in as positive a light as possible because continued funding may depend on how well it can be demonstrated that the previous phase was successful. Accountability evaluation can be viewed as an unavoidable routine and particularly the partners in the South may view different reporting systems first and foremost as a means of control.

However, international civil society organisations have increasingly promoted the importance of evaluation which has learning as its objective. Evaluation based on learning and developmental motives emphasizes collective discussion of both successes and failures, and the development of the activity based on this evaluation information, rather than trying to prove success stories. The bigger international organisations, such as ActionAid, have developed monitoring and evaluation systems that take learning into account at different stages, and which are also allocated financial and time resources.

Learning in civil society organisations is not always easy, however. Learning requires taking a distance to your own activity, critical thinking, and bringing in critical observations to the collective discussion. Research into organisational learning has observed that the activist culture typical to organisations can prevent organisational learning. It is typical to activist cultures that people already "know" how things should be and how they should be done. This culture also emphasises "a spirit of doing things" that does not include different kinds of reports and reflections.

The *Evaluation for everyday use* project included discussion about the challenges and opportunities related to organisational learning. The participating organisations recognized the accountability motive in their own evaluation, but getting involved in the project already showed that they wanted more of the learning component in their evaluation activities.

# Starting points of the developmental project

The *Evaluation for everyday use* project was therefore not about evaluating the activity of the organisations but about analysing and developing evaluation. The term **evaluation** was understood broadly in the project. It was not confined to the evaluation of development cooperation related to the project cycle but included all the evaluation activity of the organisations, whether it was at the project level or at the level of the whole organisation. The broad approach made it possible to think about the organisations' evaluation activity and evaluation culture in a holistic way. The organisations that got involved in the project may have had some kind of pre-defined developmental task but this could change based on the analytical process they went through during the project.

## Developmental Work Research approach

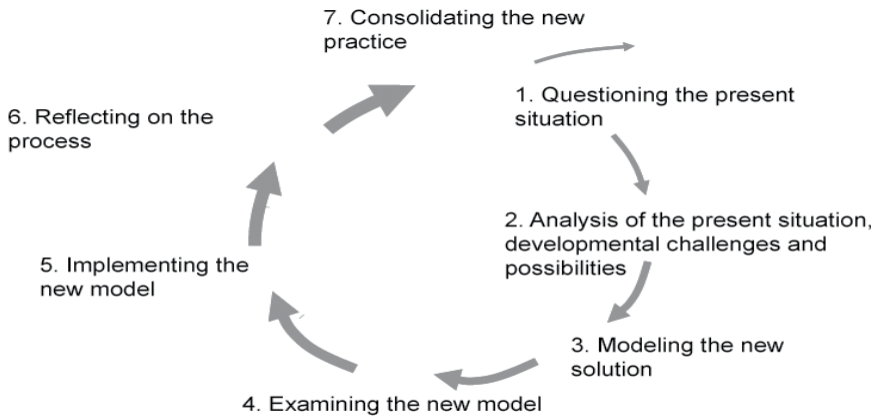
The project was based on the Developmental Work Research approach[5]5, and the expansive learning cycle behind it (Image 1). The developmental workshops of individual organisations were planned on the basis of the phases of the cycle: identifying a need state, analysis of the old activity model, creating a new activity model, testing the new activity model, and consolidating the new activity model.

The three central principles of Developmental Work Research are historicity, instrumentalism and contradictoriness. Historicity means here that in the developmental work we are moving in each organisation's *zone of proximal development*. This zone of proximal development was defined together with the organisations by analysing what kind of historical stages there have been in the activity and evaluation of the organisation, and what could be the next possible step taken in the framework of the project.

In this context instrumentalism means that in all activity and its development it is central to take into account the compatibility of the activity's objectives and the instruments to be used. In this case instruments can mean the concrete resources, skills, models, methods and guidelines that make evaluation activity possible. The learning of an organisation requires the development and utilisation of new instruments as part of everyday routines. It is easy to come up with ideas at the level of talking but changing the way we do things is more difficult.

5 Re. the Developmental Work Research approach see for example: Engestöm 1995; Virkkunen ja Ahonen 2007; Heikkinen, Kontinen & Häkkinen 2006.

**Image 1. Cycle of expansive learning (Engeström 1987)**




Contradictoriness refers to the fact that learning is seen to get its strength from the tensions and contradictions manifested in the activity. New targets require new instruments, a new kind of evaluation thinking is in contradiction to the old division of labour, or new rules set by the Ministry for Foreign Affairs are in contradiction with the old instruments. Developmental Work Research aims to recognise these tensions and contradictions, and to make use of them in the changing and learning of the organisation.

The *Evaluation for everyday use* process also took learning from the evaluation methods of the European Foundation for Quality Management (EFQM) and the principles of the so-called appreciative inquiry, where attention is at first focused on existing strengths and functioning practices whose continuation is worth supporting.[6] Only after this can the discussion start on the issues and problems that require development.

## Pilot organisations

Organisations for the pilot phase of the *Evaluation for everyday use* were sought with an open call through email list of the development movement. In 2009 five pilot organisations started the project and in 2010 another five joined in. The 2010 project

6 See http://www.efqm.org/en and http://www.laatukeskus.fi/default.asp?docId=12255 anddhttp://appreciativeinquiry.case.edu/.

was marketed above all to those organisations that had participated in KEPA's volunteer programme Etvo[7]. Between 5-6 developmental workshops were organised with each organisation, in addition to which the organisations were given tasks between the workshops.

From the participating organisations one had already been a long-term partner organisation of the Ministry for Foreign Affairs and one was preparing a partnership agreement during the project. In 2009 three other participating organisations had applied for the partnership organisation status. All the organisations had received project support funding for development cooperation work from the Ministry for Foreign Affairs for many years. Many organisations had also received Communication and development education funds from the ministry. Their other funding consisted, for example, of project funding from Finland's Slot Machine Association and their fundraising activities.

The majority of the participating organisations (see Appendix 1) had full-time employees. In the student organisations that participated in the project the staff were part-time project coordinators, and many volunteers also participated in the activities and the workshops.

The organisations decided themselves who would participate in the workshops. From two organisations the director and representatives from all the areas of activity – for example development cooperation, advocacy work, communications, financial management, global education – participated in all the workshops. In most organisations the director participated in one or two workshops. The chairperson of the board from one of the student organisations participated in all the workshops and there were also board members present in other workshops.

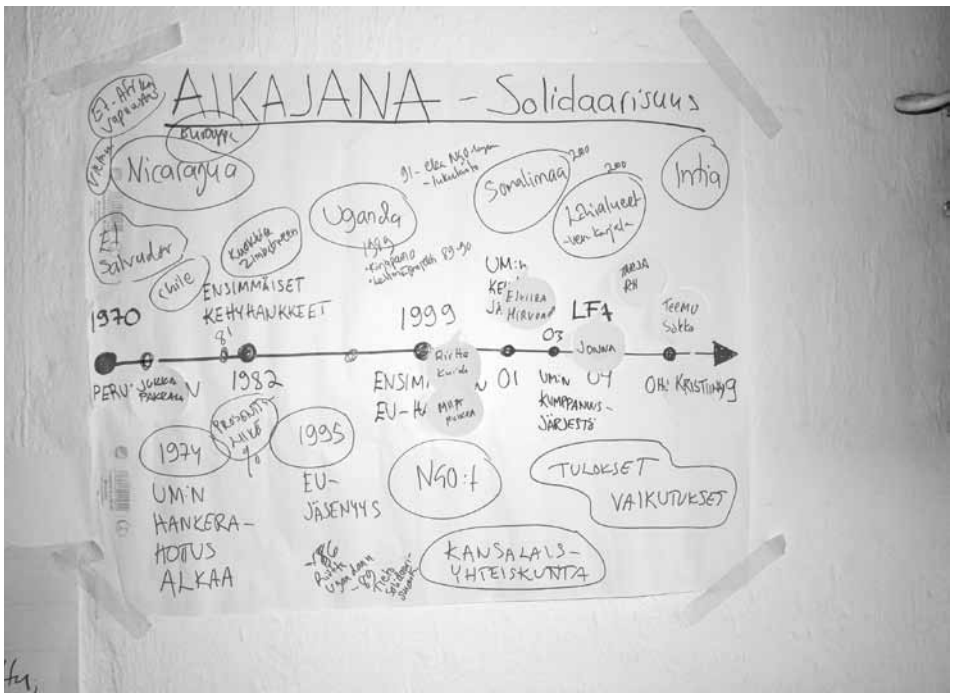
Two of the participating organisations had their own staff in the partner countries. In both organisations these workers participated in workshops that were organised in conjunction with the organisations' general staff days. Representatives of Southern partnership organisations also participated in the workshops of three organisations, and one workshop was organised in a partner organisation in Zambia.

## Developmental workshops – from analysis to implementation

The developmental processes were tailored according to the needs and timetables of individual organisations. However, the workshops followed a similar structure and employed particular activity models and instruments, especially in the first four workshops. After that the activity model depended on the developmental task.

7 See http://www.etvo.fi/.

**Image 2. Activity and evaluation timelines, International Solidarity Foundation (2009)**




The first workshop began with an introduction to the developmental project. General issues regarding evaluation were also discussed in the workshop, as well as the current evaluation objectives and motives of the organisation. The history of the organisation's activity and evaluation was also outlined. A collectively produced timeline was used as a tool on which the most important events in the organisation's history, and especially concerning evaluation, were marked (see Image 2).

The second workshop focused on the analysis of the organisation's current evaluation. In the workshop the participants first listed, often in pairs, the strengths of the organisation's evaluation activity. The strengths were recorded on Post-it notes (see Image 3). The pairs presented the strengths they had defined which were then discussed together in the group, and finally the strengths were grouped under broader themes. When analysing the strengths it was "forbidden" to analyse problems and challenges in their evaluation practices. The developmental tasks were produced with the same method after the analysis of the strengths.

**Image 3. Results of the strengths analysis, Taksvärkki (2010)**

**Image 4. Results of the developmental task analysis, SYL (2010)**


At the start of the third workshop the strengths and developmental challenges were revisited and the new issues added to that had come to mind between the workshops. After that the criteria on which the selection of the developmental task could be made was collectively defined, and points were given to the proposed developmental tasks according to these criteria.

The developmental task was decided based on the points and the next steps of the development, a concrete division of labour and the timetabling were determined. Two workshops were often used for this stage.

The fourth or fifth workshop was organised when the developmental task had progressed to some degree. The first steps of the development were analysed and it was determined what still needed to be done and according to what timetable.

**Image 5. Prioritising developmental projects by Interpedia (2010)**


The completed developmental task was presented in the final workshop and there was a discussion on how the new instrument/working practice would be taken into use and what kind of challenges it involves. In some organisations it was already possible to discuss what had happened when the new instrument/working practice was adopted.

In addition to the individual workshops, two joint seminars were organised where the participating organisations told each other about their own developmental challenges and shared the successes and problem areas related to the process. The first five pilot organisations participated in the first seminar held on 26.10.2009. A representative of one of the organisation's partners also joined in the seminar and talked about participatory evaluation in rural areas. The second seminar was organised on 14.1.2011 and included nine of the ten organisations that had participated in the project so far.

# Evaluation motives and areas

Evaluation motives can be divided into three broad areas[8]: evaluation for accountability, developmental evaluation, and evaluation to produce knowledge. Accountability evaluation focuses on the results and efficiency of the activity. The end user of an accountability evaluation is usually a funder and decision-maker who wants an answer to how well and how efficiently the funded project is working. In developmental evaluation the emphasis is on the organisation's own learning, improving performance and developing the way things are done. The main user of the evaluation, whether external or internal, is the organisation itself and its possible partners. An information production evaluation aims for general information about what works and what kind of logic needs to be implemented for projects to succeed. The commissioner and implementer of the evaluation can include several actors and the end user is a wide community involved in development cooperation work.

The organisations participating in the *Evaluation for everyday use* project stated that their current evaluations have mainly consisted of accountability evaluation. The accountability evaluations have been carried to fulfil the requirements and at the request of the funders, the Ministry for Foreign Affairs and the Finnish Slot Machine Association. It also emerged in the workshops that partner country authorities may require "evidence" showing that the organisation is doing what it claims to be doing.

The learning and developmental motive has entered the picture little by little, and becoming involved in the *Evaluation for everyday use* project partly reflected this change in motive. Learning could mean that the results of the evaluations were used for planning new projects or they were used more widely in the development of the whole organisation's activity. One learning motive was also linked to satisfying the "thirst for information" among the Finnish participants; it was hoped that monitoring and evaluation would be a source for more interesting information about the partner country, region and project.

Changing the evaluation motives from accountability to learning contained many tensions. One source of tension that appeared particularly in the relationship between the Finnish actors and those in the South concerned the open sharing of information or holding on to information. The Finnish party may have felt that the monitoring and evaluation did not tell the full story and that the Southern partner carefully selected the information to be shared. In the same way the partnership organisations in the South saw an imbalance in that they were asked to share all the in-

8 See Chelimsky 1997.

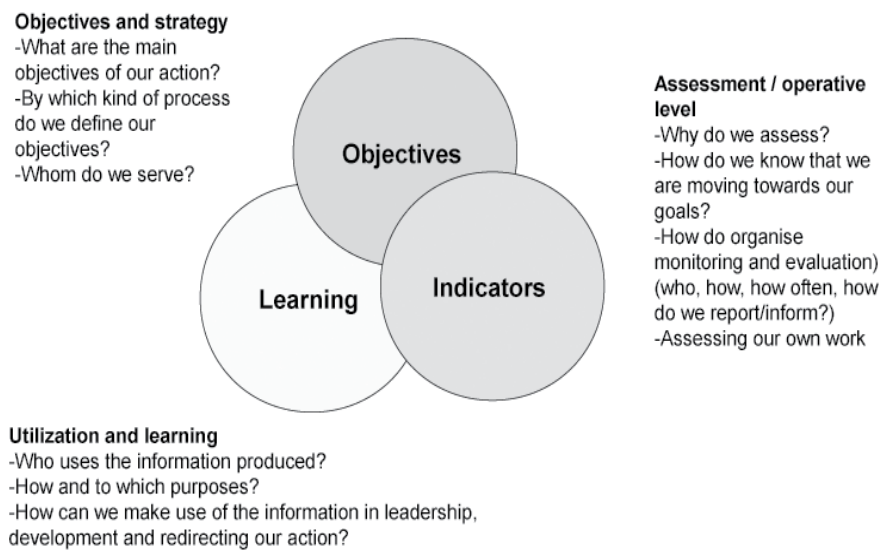
formation regarding the project and the organisation but the Finnish partner did not really want to talk about itself.

The second source of tension related to whether the monitoring and evaluation should include critical analysis or whether it should demonstrate success. The accountability motive limited critique and directed the evaluation more towards demonstrating success. The third source of tension was linked to whether the evaluation was seen to depend on the interest and enthusiasm of individuals or whether it was seen as a collective activity. For example, if only certain individuals had a strong learning motive, it was not possible to get the community or the partners to participate in self-critical evaluation, and such initiatives could be experienced as awkward or pointless.

## Objectives

In the beginning of the process we outlined the challenging areas in evaluation and their interlinkages (Image 6). Evaluation always takes place in relation to some objectives and the central question is whether we have been able to progress towards

**Image 6. Areas of evaluation and challenges. Source: VTT Technical Research Centre of Finland 2008, adapted.**



these objectives in our activity. Evaluation is very difficult if there are no objectives – so any direction whatsoever is just as good.

In development cooperation the objectives are often clearly set at the level of individual projects. Project planning frameworks already guide us to think about what is the specific objective of a project: what exactly can be achieved with this project and what is the wider development objective that the project has an impact on. Setting objectives becomes a degree more difficult when talking about the objectives of an organisation; the objectives towards which the organisation is striving for with all its activity. In recent years most organisations have prepared different strategies and programmes that define their general objectives or the objectives of their development cooperation work. At the start of the *Evaluation for everyday use* project three of the organisations had just prepared programmes for development cooperation as part of their applications to become partnership organisations with the Ministry for Foreign Affairs.

The challenge of the programmes was that they had initially been prepared on the basis of existing projects. The process had therefore not started primarily with the definition of the objectives but from what kind of project activity existed at the time, and what kind of common objective could be implemented from this sometimes fragmented project palette.

Some organisations also had a strategy. The general challenge facing strategies was that the objectives, missions and vision they presented were broad and all-encompassing. Abstract objectives – like justice – are problematic from an evaluation perspective because the gap between the general objective and the practical activity sometimes grows too big. Abstract or unclear objectives could also lead to a situation where the cooperation included many kinds of unstated "hidden objectives" that might only emerge in conflict situations.

In some organisations the clarification of the objectives was carried out with the help of the so-called "In order to" tool[9]. Organisations, like other actors, have a tendency to tell about their objectives in the form of activities: "our objective is to train 200 school teachers" or "our objective is to give micro credits to 50 Bangladeshi women's groups." These objectives are concrete but they don't say much about why the activity in question is being conducted. It is possible to strive for different kinds of things with the same kind of activity.

A simple example was used in the workshop based on a facilitator's activity in Maputo, Mozambique: buying a dress. The dress was purchased but why? Was the objective just to get some clothes to wear? To look fashionable? To support local clot-

9 Max Peberdy's training in KEPA 2008.

hes production? Fashion is probably in the eye of the beholder. But in relation to the final objective the purchase seemed very unsuccessful because the dress was bought from the store of a multinational department store chain and it was manufactured in China. However, in relation to the first objective the activity was a great success – the context being that the facilitator arrived in Maputo after a long flight to find that her luggage had been lost on the way, so the dress made it easier for her to participate in the next day's meeting.

For example, in the Finnish Refugee Council many reasons and objectives were identified both for the development cooperation projects as well as the domestic project work. After using the "In order to" tool, the objective was crystallised: the organisation does these things so that "the basic rights of refugees and immigrants would be realised".

In development cooperation it is not a question of achieving just one organisation's objectives but rather harmonising the objectives of two or more organisations. Clear objectives were seen to help also in the selection of partnership organisations. Defining the organisation's own starting points in a programme paper, for example, helped in negotiations with partnership candidates about how far the organisations have common objectives in their activities and what kind of practical cooperation could be carried out within this framework. Organisations are also constantly receiving various ad hoc contacts from different parts of the world. A clear definition of objectives also helped in justifying negative responses to these organisations.

The successful planning of cooperation requires a commitment, at least to some degree, to common objectives. These higher level common objectives could be found, for example, in international agreements like the UN Convention on the Rights of Persons with Disabilities, or the Declaration of the Rights of the Child. Preparing programme papers had often strengthened the logical connection between individual projects and in relation to wider objectives.

From the evaluation perspective, programme and organisation level objectives also signified a new kind of thinking on evaluation. Increasingly, there has been a shift from the evaluation of activities managed by an individual worker to the evaluation of wider entities consisting of fragmented parts.

## Indicators

An indicator does what is says, it indicates or tells about a situation and the change that has occurred in it. The indicator can be direct, for example increasing literacy measured by some literacy indicator, or indirect like the teacher/pupil ratio which is

believed to tell about the quality of the teaching. In general, an indicator refers to something that gives us information on whether our activity has achieved the desired changes. An indicator is easily linked to measurability; for example an indicator tells whether poverty has been reduced, the quality of education has improved or whether the incidence of malaria has fallen during the project by 13% or 17%. An indicator can, however, also be a qualitative indicator which often refers to change experienced by the beneficiaries.

Indicators are currently quite central in the planning and evaluation of development cooperation projects. The logical framework behind the project planning forms of the Ministry for Foreign Affairs directs organisations to prepare indicators for all levels of the hierarchy of objectives. At the activity level, the indicator tells whether an activity has been completed or not; at the results level it is possible to examine through an indicator what happened as a result of the activity. At the development objective level we want to know what kind of impacts the project had that were in line with what was aimed for.

Every organisation that has applied for project support and reported to the Ministry for Foreign Affairs has prepared project indicators – at least on paper. In the workshops some organisations discussed how easily the preparation of the indicators is left to the last minute and becomes a writing job for someone at their desk in Finland.

Other challenges related to indicators were their quantity and their connection to the objectives. It is easy to include a long list of things in the indicators that we want to know about and monitor, but the required information is impossible to collect due to resource limitations. In one organisation it was noted that the previous year they had prepared indicators together with a partner organisation in what was a rewarding process, but this list of about twenty points had remained external to the project plan and, to a certain extent, to the project's objectives.

Indicators were seen as most effective in an organisation that systematically used a logical frame of reference in the planning and monitoring of development cooperation projects. The organisation mapped out the initial situation based on indicators, which enabled the monitoring and the verification of change. Well-chosen indicators that were continuously monitored during the project brought reliability to the evaluation.

Indicators were not problem-free in any of the organisations; especially the relationship between qualitative objectives and measurable indicators was a source of difficulties. Another challenge related to applying indicator thinking to the programme level instead of the project level. Is it possible to prepare measurable indicators for

**Image 7. Preparing programme indicators, International Solidarity Foundation and Finnish Disabled People's International Development Association (2010)**

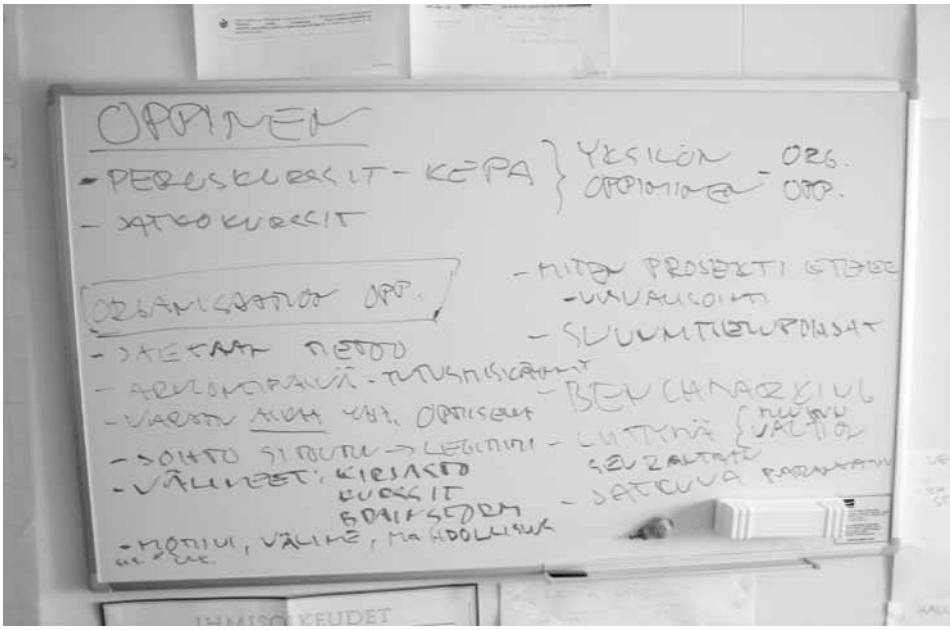
the programme level objectives which are implemented with very different projects in different parts of the world?

The foundation for successful indicator-based evaluation is that it is possible to define the central dimensions of the objectives about which information should be collected. From the many possible indicators, it is necessary to prioritise those that tell about the objectives and which can realistically be monitored. In a successful evaluation it is also determined over what time period the indicators are followed and how this monitoring is systemized and analysed.

In a large part of the development cooperation work carried out by civil society organisations the objectives are linked to changing people's attitudes and activities – an objective that is rarely possible to monitor, for example, on a quarterly basis. In one organisation there was a discussion about the difficulty of verifying, for example, a change in the attitudes and cultural practices affecting the mutilation of girls' sexual organs even in the mid-term review, and even in the final evaluation it was maybe only possible to observe some steps taken towards change.

Concerning the scheduling and systematization of evaluation, the organisations saw a threat that the monitoring and evaluation becomes more laborious than the actual implementation of the activities. Especially the field workers of the organisations raised the issue that each project has its own rhythm and it is difficult to find a monitoring and evaluation cycle that suits everyone, even when working under the same programme. For example, projects connected to agricultural production proceed in different cycles depending on the continent and region.

**Image 8. Reflections of learning, Finnish Overseas Lutheran Mission (2009)**



## Learning

What happens to all the evaluation information collected and how is it utilised? Collecting evaluation data on computer files, on a book shelf or in the archives of the funders does not support learning and the development of an activity. Collective processing and reflection on the evaluation data enable the utilisation of evaluation and learning from it. Finnish Overseas Lutheran Mission identified organisational learning as one of the evaluation targets in its programme.

The organisations used evaluation reports as the basis for planning new projects, for example. In these cases, the monitoring and evaluation data was often used, for example, by a project coordinator who managed the projects of a specific region or theme. The mid-term and final evaluations of previous projects were a valuable tool in the planning and redirecting of follow-up projects.

Using different kinds of evaluation information in the broader internal development of an organisation was fairly limited. For example, the opportunity offered by the annual report process for collective reflection was not widely taken; often the sections of the annual report were produced by individuals and discussions would be

more on the director-individual worker axis. Some organisations held staff days where it was possible to have discussions about evaluation. However, these days were often filled with different practical issues, such as the financial management procedures that were common to everyone.

In addition to the organisation's internal learning, it was also challenging to utilise monitoring data in joint learning with a partner organisation. Monitoring and evaluation data was sent by the partners to Finland but it felt like there was rarely time to give feedback. "Sometimes you send a thank you for the report..." stated one employee who had responsibility for many projects. The lack of feedback was also seen to affect the motivation of the partner: "the partners probably feel that those reports disappear into some black hole".

In many organisations there were attempts to create feedback and learning events with the partners around the mid-term and final evaluations. The remit of an external evaluation may have included giving feedback about the results to the partners and the Finnish organisation. Or the completed report was discussed together when the opportunity arose. One organisation had systematically strived towards a reciprocal annual evaluation and learning through that. The Finnish organisation commented on the partner organisation's annual report and presented suggestions for improvements, and the partner organisation commented on the Finnish organisation's annual report and its challenges.

One organisation had tried a new kind of partnership seminar where representatives of partnership organisations from different countries were invited to Finland at the same time for a week-long visit. The experiment was seen as a good learning forum. In addition to improving their understanding of the Finnish organisation's objectives and way of doing things, during the week the partners also learned about different strategies from each other for solving similar problems in their home countries.

Scarce resources and traditional ways of doing things were seen as the main factors constraining the opportunities for learning. Being together and chewing over the evaluation data requires time, and field trips, for example, rarely have opportunities for this. The daily schedules are tight and time is spent on different kinds of visits and especially in meetings related to financial management.

One of the issues mentioned regarding the way of doing things was that because the workers are so committed to development cooperation on a very personal level, an evaluation may feel more like a critique of the worker's personality and personal work rather than a collective developmental reflection. Internal tensions within an organisation or competitive situations between organisations could also hinder eva-

luation. Sharing information with other organisations could be seen as threatening and some organisations also had bad experiences regarding this. They felt that the information shared by the organisation had been unfairly used for the benefit of other organisations.

In the South-North relationship learning was hindered by mutual preconceptions regarding monitoring and evaluation, which emphasized the control task more than the learning task. In one organisation monitoring was referred to with the term "inspection journey", which refers directly to accountability. With many other organisations, a large part of face to face meetings during monitoring trips was also spent on clarifying questions and going through receipts.

In many organisations it was felt that it was especially the conceptions of the partners that weakened the realisation of learning objectives. Monitoring and evaluation could be viewed as unpleasant control by the Southern partnership organisations and among the beneficiaries of the projects. For example, one organisation explained that they had to change the title of the local workers in a field office because "monitoring officer" provoked too many negative attitudes among the beneficiaries. The new term was "development officer".

# Evaluation histories

The histories of the organisations participating in the project were very different, with some having worked in development cooperation work for many decades, while others had only started their first development cooperation project a few years ago. The history of *International Solidarity Foundation* started in the 1960s when it initially exported hoes to Zimbabwe, and the foundation was established in 1970. *Finnish Refugee Council* was established in 1965 and *Taksvärkki* in 1989. *Interpedia* started in 1974 as an adoption organisation and has widened its operations to development cooperation work based on children's rights. *Finnish Overseas Lutheran Mission* has traditions going back decades, first in the field of missionary work and later also in development cooperation. *Finland's Adventist Development and Relief Agency* had been carrying out aid projects under the Adventist church for a long time but only started as an independent foundation focusing on development cooperation during the *Evaluation for everyday use* project. Some student organisations have long traditions in development cooperation and international solidarity work. For example, the *Student Union of the University of Helsinki* has been doing solidarity work as part of its activities since the 1950s.

The organisations participating in the *Evaluation for everyday use* project were all in their own particular historical situation and these were described by creating their unique timelines. The mid-1970s was significant period in terms of development cooperation because this is when the Ministry for Foreign Affairs started granting project support for the development cooperation work of the civil society organisations. A common trend in the content of the development cooperation seemed to be that in the early stage of the work the organisations were collecting different kinds of goods, like sewing machines and bicycles, for export to the developing countries, while also conducting small-scale import and retail activity of products from developing countries in Finland. The project ideas and contacts were often dependent on one person and changed with the people involved.

As the amounts of project funding increased, more attention was also given to project planning. The professionalization of project work started in the Finnish organisations at the end of the 1980s. This involved the systemization of project planning and, gradually, the utilisation of different tools like the Logical Framework Approach (LFA). Alongside the tools, more and more attention was focused on defining objectives both on the project and organisation level. Cooperation was conducted more often between organisations than individual people, the cooperation relationships were increasingly defined in written form, and joint budgeting between partners

increased. Instead of physically moving cash, organisations started making money transfers through the banking systems. This has been helped by the development of banking institutions in the partner countries and the organisations having their own bank accounts.

After the development of planning, there has also been more focus on monitoring and evaluation. Of course financial monitoring has been conducted since project activities started, but evaluation as part of the project cycle has become more important during the past decade. In one middle-sized organisation it was stated that:

> *"But that evaluation term, I think it has only been systematically done for two or three years, so that every time a project plan is made the evaluation is really included, maybe it was there for the first time in the applications submitted in 2007."*

The organisations participating in the project were in very different situations regarding professionalization. In some organisations there had already been salaried workers for decades, who had gained project management and evaluation skills through training and experience. Other organisations, especially those operating on a volunteer basis, did not have much experience or training. In an organisation focusing on religious mission work, the training of the people going to the field focused more on the proclamation work and country knowledge than project management training for development cooperation work. In the student organisations it was typical that development cooperation coordinators changed frequently and they did not have much experience in the tasks. In the student organisations many central actors had taken development studies or sustainable development courses and had personal experience in developing countries, perhaps in volunteer work.

# Current state of evaluation: levels, targets and tools

The current state of evaluation in the organisations was analysed by considering questions about evaluation levels, targets and the tools related to them (Image 5). With the help of an analysis chart, the current state of an organisation's evaluation activity was examined as a totality: what kind of evaluative tools and practices does the organisation have and what kind of entities are they used to evaluate. Working in groups, the workshop participants listed the tools and then located them in the boxes of the chart. The participants placed the tools and practices that existed in the organisation in the chart according to what they were used to evaluate and at what level.

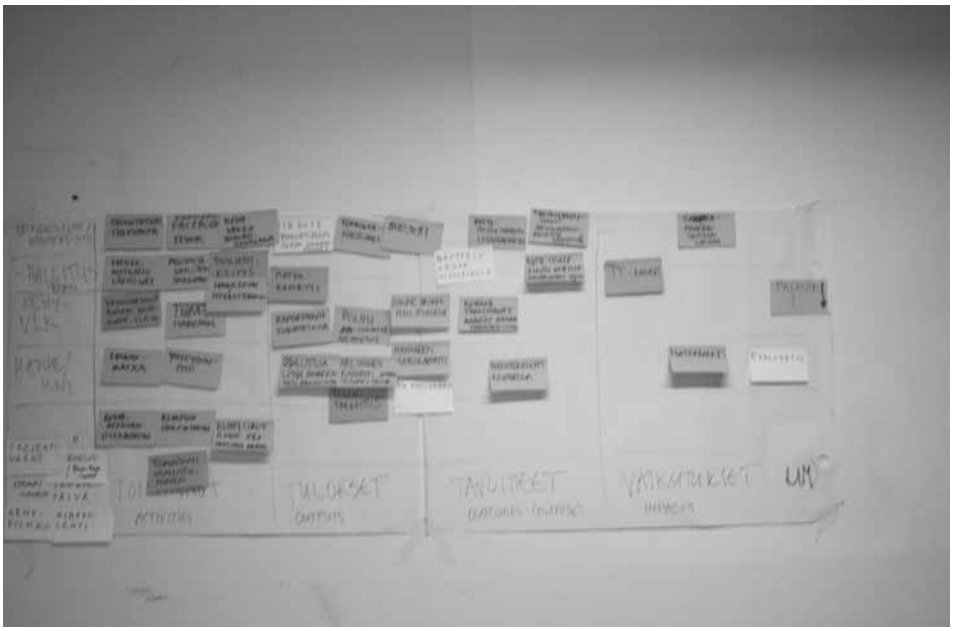
**Image 9. Analysis tool for the evaluation of levels, targets and tools**

| | | | | |
|---|---|---|---|---|
| **Network** | | | | |
| **Organisation** | | | | |
| **Programme** | | | | |
| **Project / partner** | | | | |
| **Individual** | | | | |
| | **Activities** | **Outputs** | **Outcomes** | **Impacts** |

With the help of the chart, the participants analysed at what level the tool is used and what is the target of the evaluation when using the tool. The evaluation levels varied according to the organisation; for example not all the organisations had a programme level or an international network level, while some had, for example, a unit level before the organisation level. In the case of Finnish Disabled People's International Development Association's partner programme, the programme level was above the organisation level because the partner programme is formed by a union of individual organisations. The chart was modified collectively to make it appropriate for each organisation (for example Image 10).

As a result of the analysis it was possible to conclude that the most tools were on the project level for evaluating activities, use of funds and results. There was a desire for more evaluation tools at the individual level – welfare at work, for example – as well as tools for analysing programme and organisational level impacts.

**Image 10. Analysis of the levels, tasks and tools, Student Union of the University of Helsinki (2010)**



## Developmental tasks in evaluation[10]

In the workshops the organisations identified the strengths and challenges in their evaluation practices and selected one developmental task to take forward (Chart 1). All the organisations saw it as a strength that evaluation had been taken up as part of the organisation's work and that they had a desire to further develop their own evaluation activity.

One of the biggest strengths of the organisations was that they already had many monitoring and evaluation tools, routines and an interest in developing evaluation. Some organisations already had different monitoring and evaluation guidelines and manuals that could comprehensively describe the whole project cycle. Other guidelines focused on details like the quarterly financial reporting. Some organisations mainly used the project planning and report templates of the Ministry for Foreign Affair's as their monitoring and evaluation guidelines. It was also seen as a strength that the organisations had defined different kinds of indicators to support evaluation, especially at the level of individual projects.

10 The quotes are from the representatives of the participating organisations at the joint *Evaluation for everyday use* seminar organised on 14.1.2011

**Chart 1. Developmental tasks selected by the organisations**

| Organisation | Selected developmental task |
|---|---|
| Adventist Development and Relief Agency | Planning for a project monitoring and planning trip |
| Finnish Disabled People's International Development Association | Programme level indicators |
| Student Union of the University of Helsinki | Development cooperation guide* |
| Interpedia | Programme level indicators |
| Finnish Overseas Lutheran Mission | Programme level monitoring tool based on a balanced score card |
| International Solidarity Foundation | Programme level indicators** |
| Finnish Refugee Council | Monitoring and evaluation guidelines that contain the activity of the whole organization |
| Taksvärkki | Harmonising the strategy and operative plan, including monitoring indicators |
| Student Union of the Turku University of Applied Sciences | Monitoring and evaluation guidelines for a development cooperation project |
| National Union of University Students | Monitoring and evaluation guidelines for development cooperation projects*** |

* The development cooperation guide is available at: http://blogs.helsinki.fi/kehyvaliokunta/files/2011/04/Kehy-opas-6.4.2011.pdf
** The results of the developmental work can be explored in the 2010 annual report http://www.solidaarisuus.fi/solidaarisuus/
*** *Guidelines for conducting development cooperation projects* is freely available from the development cooperation coordinator of the National Union of University Students in Finland

The organisations had many kinds of developmental tasks. One clear developmental area that was selected by many organisations was the preparation of their own new **monitoring and evaluation guidelines**. It was felt in many organisations that evaluation methods and practices were tied to the tasks and interest areas of individual workers, and it was difficult to get the whole picture about monitoring and evaluation for oneself or to communicate about it to partners. Especially in the student organisations, the constant turnover of people responsible for development cooperation had made written and systematic guidelines necessary. The preparation of guidelines emerged as the central developmental task in the *Student Union of the University of Helsinki*, *National Union of University Students*, *Finnish Refugee Council*, and the *Student Union of the Turku University of Applied Sciences*, in all of which guidelines were prepared with wide-ranging cooperation for different areas of evaluation. In the National Union of University Students and the Student Union of the Turku University of Applied Sciences, the guidelines were tied to the project cycle and development cooperation projects. In addition to development cooperation, the Finnish Refugee Council's guidelines also encompassed domestic project work, communications, funding procurement, and management.

A second developmental area was related to **indicators** and especially the development of programme indicators. *International Solidarity Foundation* is implementing two thematic programmes: the gender equality programme and the livelihoods programme. There are 16 different projects within the programmes, located in many different countries. The organisation came up with the two thematic programmes as a result of a programme process carried out in 2006-2007. At the end of 2008 the organisation wanted to focus on developing the programme evaluation and its related indicators. The situation of the *Finnish Disabled People's International Development Association* was exceptional because it was not a case of programme work inside one organisation but a joint new development cooperation programme for many organisations undertaking different disability projects, based on four basic pillars[11] that required the development of indicators to support the monitoring of its implementation.

The third developmental area was about adapting new **areas of evaluation** in the monitoring and evaluation of the organisation that differed from the traditional project activity. This meant, for example, adding new kinds of questions and viewpoints to the reports. The clearest example of these was a project by the *Finnish Overseas Lut-*

11 These pillars are: reduction in the obstacles to the participation of disabled people, empowerment of disabled people and their organisations, equal rights for disabled people in education, work and social security, and equal rights for disabled women.

*heran Mission* where new kinds of areas of evaluation or themes for the development cooperation programme were developed on the basis of a balanced score card used in the private sector. From these new areas of evaluation particular weight was given to the evaluation of a "learning organisation".

The fourth developmental area related to **clarifying objectives and indicators**, and making them more realistic. This was central, for example, in *Interpedia's* process where the programme paper prepared in 2007-2008 had remained unfinished to some extent. During the process, parts of the programme were taken out and the setting of objectives was clarified. At the same time the number of indicators was reduced and it was discussed whether they really described the objective that they were assumed to describe.

The fifth developmental task related to **including the whole organisation as part of the evaluation**. Traditionally evaluation was strong in development cooperation projects but there had been little evaluation of communications, advocacy work and domestic projects. This objective was part of the evaluation guidelines development by *Finnish Refugee Council* and the preparation of programme indicators by *International Solidarity Foundation*. Bringing the whole organisation in the realm of monitoring and evaluation emerged most prominently in *Taksvärkki*, which harmonised its strategic objectives, the operative plan and its monitoring.

# Ideas and tools

The organisations participating in the *Evaluation for everyday use* project came up with different ideas and tools that could also be useful for other organisations. For detailed information please contact the representatives of the organisations directly. Here is a collection of general observations about the organisations' new ideas and tools.

## Programme work

Many organisations have moved or are in the process of moving from implementing individual projects to programme-based work. A programme that guides activity is a requirement for the partnership organisations of the Ministry for Foreign Affairs. Two of the organisations that participated in the project were involved in the partnership funding and a few others had prepared a programme for the new partnership application round conducted in 2009. In this round of applications only *Finnish Disabled People's International Development Association's* disability partnership programme was selected as a new partnership organisation by the ministry.

The basic idea behind programme-based work is that the development cooperation organisation defines its central operating areas and objectives in the programme, which are supported by the projects it implements and its other activity. Examples of such programmes are the two thematic contents, "Gender equality" and "Work and livelihood", of *International Solidarity Foundation's* programme. Another example is *Finnish Disabled People's International Development Association's* partnership programme which is built on four basic pillars. In the development cooperation strategy of the *National Union of University Students*, there is a strong emphasis on the quality of the cooperation and partnership, rather than on tightly defined themes. *Interpedia's* programme developed from a collection of country programmes towards a more thematic programme as the *Evaluation for everyday use* process progressed. The programme is constructed around the declaration on the rights of children. The foundation of *Finnish Overseas Lutheran Mission's* programme is a general objective for life that is worthy of a human being. *Taksvärkki* has a strategy and during the developmental project the operative plan was improved to correspond with the programmatic thinking. Development cooperation, global education, communications and management formed an entity formulated under four sub-objectives.

Clear objectives were seen as a prerequisite for successful programme work. These objectives were often sourced from wider international agreements or statements.

Some organisations implemented their objectives without an actual written strategy but their work was guided, for example, by internationally defined human rights.

> *"If young people's human rights and children's rights are behind all activity in a way, then that already changes it more towards a programme type entity."*

Ideally, the programme of an organisation guides the selection of activities and projects. In practice, however, it has been usual that at first an organisation – or organisations in the case of Finnish Disabled People's International Development Association – has already had different existing projects that it has started grouping into a programme. As a starting point, not all the projects were originally planned on the basis of specific joint programme objectives, but rather each project has had its own project-specific objectives that have been shaped in the discussions with partners.

From the viewpoint of the organisations, the shift to programmatic thinking was seen as a way to strengthen their activity and to systemize fragmented project activity. The shift from thinking about individual projects to programmatic thinking is also a radical change which does not happen overnight. As a representative of another organisation commented on Taksvärkki's process during the joint seminar:

> *"It's a really big change that Taksvärkki has moved to programmatic thinking, which is really not self-evident in many organisations."*

Moving to programmatic thinking also meant decisions about ending existing cooperation relationships or projects in a situation where their content and objectives did not fit into the objectives of the programme.

## Guidelines and joint reporting templates

Another common monitoring and evaluation trend in the organisations was the preparation of comprehensive guidelines and reporting templates. Apart from the report template of the Ministry for Foreign Affairs, not all organisations have had systematic guidelines on what kind of monitoring reports and evaluation is carried out at different stages of the projects.

Collecting all the guidelines and reporting templates concerning the individual stages of projects was often the first step towards preparing the guidelines. The organisation's strategic objectives or programmatic objectives were also included in the guidelines so that the user could understand why all this data collection was

being carried out. In its guidelines, *Finnish Refugee Council* made good use of the thinking about levels that was used in the workshops.

> *"We got a structure, presented the responsibilities at the different levels more clearly, and with this also came the monthly plan and report for each worker."*

Using joint guidelines was seen to help communication with partners and to strengthen the institutional memory of the organisations. The turnover of workers and volunteers is high in the organisations and guidelines make it easier for new workers to get acquainted with an organisation's way of doing things.

> *"So the actors change every year. And the person responsible for development cooperation on the board of the National Union of University Students also changes annually so it's quite a challenging equation to somehow maintain continuity. The development cooperation coordinator has a major role in keeping all the strings together."*

Preparing joint guidelines collectively also meant making existing practices visible and standardising them. Some practices or tools were cut and new collective tools were developed to replace them. The goal was to shift from individual practices tied to people, to the organisation's collective practices and tools.

> *"Systemization has perhaps also been the key word, we've had loads of different information, scattered information in people's heads and different documents here, there and in that file over there and on confusing network disks, but now we have systemized more."*

The collective process in the making of the guidelines was seen as important. The more all the workers and partners of the organisation participated in the preparation of the guidelines, the more useful they were seen to be. Although from time to time it was questioned whether it is necessary in every organisation to "invent the same wheel again", a collective process was seen as better than adopting the ready-made guidelines of other organisations. A common view was that because each organisation has its own values as the basis of its activity, the evaluation tools inevitably also have their own special character.

> *"Guidelines reflect the organisation's own history, they are all a little different in any case, so it just doesn't work."*

Existing guidelines can give ideas and clues to what each organisation's own guidelines could include. For example, guidelines made on the basis of project cycle thinking are easy to transfer from one organisation to another but the meaning of many terms such as "analysis of the operating environment" can easily remain unclear in an organisation unless it is openly defined. For some an analysis of the operating environment can mean systematic research by a consultant for a few months, for others short visits made during a project planning trip to the offices of the local authorities, for example.

Sharing the guidelines of Finnish organisations with other organisations was hindered to some degree by the idea of competition or that they did not want to give the results of their own work to other organisations. On the other hand, some organisations had their own guidelines freely available on their websites. The resources of an organisation should be taken into account when applying the guidelines, however. If the guidelines have been made with the assumption that the organisation even has its own 'monitoring and evaluation' unit in each partner country, then the amount of work required to follow the guidelines may not necessarily be appropriate to another organisation's resources. For example, *Adventist Development and Relief Agency* received comprehensively prepared LFA based project planning and monitoring guidelines from its sister organisation. However, these were difficult to utilise as such in the Finnish foundation, where development cooperation was mainly implemented through the efforts of part-time workers and volunteers.

## Logical Framework Approach (LFA) as a tool

LFA , the most important project planning and management tool in development cooperation, was used in all organisations to some extent because the project funding application and the reporting templates of the Ministry for Foreign Affairs are based on LFA's terminology and hierarchical structure. How LFA was used, and how it was viewed, varied. In some organisations LFA was in daily use and others wanted to learn more about LFA and use it more widely, whereas in some organisations there was a more critical attitude towards its usefulness. How comprehensively LFA was implemented at all the stages of a project varied depending on the organisation.

During the *Evaluation for everyday use* project the Ministry for Foreign Affairs was preparing new quality criteria for the work of the partnership organisations and new guidelines for the planning of development cooperation work by civil society organisations. In the guidelines the project management is assumed to be based on LFA. A representative of the ministry attended one of the evaluation workshops in August

2010 and presented the LFA based monitoring and evaluation tool currently used for bilateral projects. This prompted an interesting discussion about the usefulness of LFA in civil society projects and the difficulty of implementing it in partnership organisations not familiar with its way of thinking.

> *"For many of our partners these LFAs don't really mean a great deal, although they know how to use it, it doesn't quite open to them... I once saw a video about an annual report and it was good."*

The challenging nature of LFA was primarily related to the unfamiliarity of its terminology and logic. The words used differ from everyday terminology and in the planning process it is easy to start pondering the meaning of the terms instead of focusing on the actual project content. The use of LFA tools seemed in some cases to alienate people from what was viewed as important and interesting in development cooperation. This problem has occurred especially in situations where the beneficiaries have participated in evaluation seminars based on a LFA project plan.

> *"It was like a waste of time for the beneficiaries to participate in the evaluation seminar, of course they can't invent things from our project plan (...) and it would also be easier for the partner to start from the results before dealing with the objective."*

However, if the partner was an experienced development cooperation organisation, then LFA offered a common language and approach that aided the project cooperation work. For example, *Taksvärkki's* project coordinators told about their experiences of successful LFA workshops where the joint project planning had progressed with the help of the tools. *Finnish Overseas Lutheran Mission's* partner in Central Asia was a professional organisation that worked with many funders and efficiently implemented LFA based planning and reporting activities.

In *International Solidarity Foundation*, LFA had already been used in development cooperation project evaluation and planning for many years and it was applied to all new projects. This was helped by the organisation's comprehensive project planning and monitoring manual which defines what kind of analyses are made in the project planning stage and how to proceed at the different stages of the project. LFA was viewed as a useful approach that had helped to systemize project work in different countries. In some areas it had been a challenge to find consultants who could master LFA in order to support the planning and monitoring of the partnership organisations. International Solidarity Foundation's thematic development cooperation

programmes also followed the hierarchical logic of LFA and in the organisation's *Evaluation for everyday use* process the same logic was also adapted to communications and funding procurement.

*Interpedia* also used LFA in projects funded by the Ministry for Foreign Affairs. Its partners planned project proposals according to LFA logic. In Interpedia this logic was seen as partly useful but also challenging. Especially the volunteers who had worked with partnership organisations as part of KEPA's Etvo volunteer programme in the South reported how difficult it was for them and the partnership organisations to internalise the LFA logic and shape the plan accordingly. The idea of using alternative reporting methods had arisen in Interpedia, especially in the projects funded by sponsors. The organisation had started using the so-called narrative report where, instead of indicators, they wanted stories about how the people in the project's sphere of influence had experienced the change themselves. The stories were collected systematically in conjunction with other reporting.

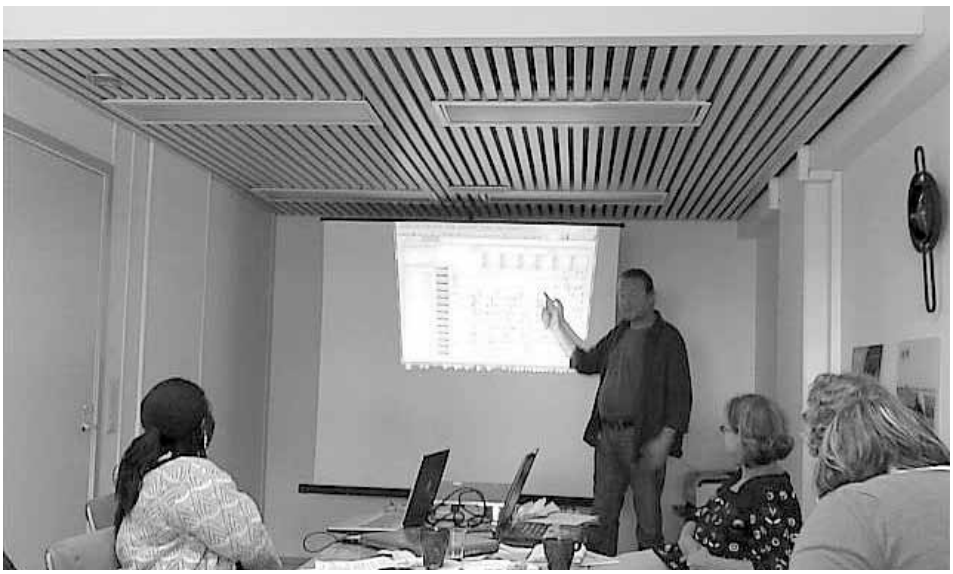
## Cooperation with partners

One of the central challenges of monitoring and evaluation was cooperation with the partnership organisations. The difficulty of consistently good cooperation emerged especially in those organisations that had many partners in different countries but did not have their own coordinators or country offices. In this situation the face to face interaction that is important to building the cooperation remained limited and was conducted during hurried field trips. Monitoring and evaluation can easily become, first and foremost, a means of control where the task of the Southern partner is to report if the project has done everything as promised, and the meetings are spent going through long lists of clarifying questions.

During the *Evaluation for everyday use* project there emerged a strong desire by the organisations to also increase monitoring and evaluation cooperation with their partners, and some organisations had, for example, been using KEPA's Compass for Partnership tool. The Student Union of University Students had even raised a well-functioning partnership to be the main goal of its development cooperation strategy and strongly emphasized the monitoring and evaluation of the quality of the partnership in the guidelines that it prepared.

> *"We also thought about how our partners could evaluate us, we could suggest to them some set of questions with which they could report about us perhaps in conjunction with the annual report."*

**Image 11. Country director presents an evaluation tool for literacy training, Finnish Refugee Council (2009)**



The problem of one-sided reporting and the lack of feedback directed from Finland to the partners were recognised at the beginning of *Finnish Refugee Council's Evaluation for everyday use* process. In their initial analyses it was also observed that the Finnish offices did not have a comprehensive picture about what kind of monitoring tools of their own the Southern partnership organisations had. During the process the partnership organisations were asked about the monitoring tools they were using and these were compiled in the example section of the guidelines. Some partnership organisations had many different monitoring tools regarding, for example, the activity of the organisation and the welfare of the staff. They were also using evaluation methods that could be adapted to different types of situations or beneficiaries. For example, completed literacy training workbooks could be photographed or beneficiaries could be asked about improvements in welfare with the help of human figures drawn on the ground: the bigger the belly of the figure, the better the welfare.

The *Student Union of the Turku University of Applied Sciences* had tried two-sided reporting with its Zambian partner GLM. In addition to GLM reporting to TUO about the project and partly about the activity of the whole organisation, TUO had also reported to GLM about its own activity and its challenges. The report had been discussed in a joint meeting and the Zambian partner had given useful suggestions for improvements in TUO's activity.

**Image 12. Joint analysis about reporting by the Student Union of the Turku University of Applied Sciences and its partner organisation (2009)**


*Interpedia* had organised a meeting, for the first time in Finland, where many partnership organisations participated from different parts of the world. The intensive one-week meeting was seen as a useful way to strengthen partnerships and to assist the exchange of ideas and experiences between the partners. The simultaneous attendance of the partners as Interpedia's guests had also encouraged them to critically examine Interpedia's activity and to give feedback. The contribution of a Nepalese partner organisation was important in the development of programme indicators during the *Evaluation for everyday use* project when a worker of the partner organisation who had been a Southern volunteer joined the developmental project and took an active role in the development of the programme document.

Other practical ideas for increasing interaction were, for example, monthly Skype calls to the partners. Instead of individual questions – or in addition to them – the purpose of the calls or chats could be more about exchanging general news and maintaining social relationships.

> *"There was an idea about improving partnership and transparency, as we hardly report anything over there, that perhaps we could have a short monthly email about things."*

**Image 13. Workshop scenes, Finnish Refugee Council (2009) and Taksvärkki (2010).**

Communication with a partner could depend on basic issues like the lack of a common language or that basic documents, such as the project plan or programme of the organisation, were not available in English. The lack of different language versions for documents reflected different interests and resource problems. For example it could be that the board of an organisation required the programme in Finnish and the organisation did not have the resources to also translate it into English and Spanish.

There was also a wider challenge than the language issue related to the increasingly prevalent programmatic thinking over the ownership of objectives and in finding joint objectives between organisations in Finland and in the South. The cooperation between organisations was realised through individual projects and fitting them in the organisational objectives of both organisations was challenging.

> *"In a way projects lead their own life because the partners don't own our programme, so our programme is our programme, and the partners and us do that project work together."*

From the perspective of a Southern partner organisation, the preparation, refocusing or changing of a Finnish organisation's programmes may mean the strengthening of the cooperation relationship or a threat to end it, if the organisation's activity no longer corresponds to the new emphases of the Finnish organisations.

## Indicators

The organisations focused a great deal on defining indicators that assist monitoring and evaluation. Indicators were seen as good supporting tools for monitoring and evaluation but there were problems related to defining and utilising them. The ideas relating to indicators that emerged from the *Evaluation for everyday use* process were primarily linked to reducing the number of indicators and making them more focused.

In some organisations the monitoring conducted through indicators widened from the monitoring of development cooperation projects to also include the organisations' other activities. In *Taksvärkki* the new idea was to define indicators for the activity of the whole organisation with the help of a new kind of structure for the operative plan.

> *"And then there are the indicators, we have an objective and activity... it is difficult but let's say that we have made a start, it is now possible to do it because we have managed to produce a chart that has a place for the indicator."*

Reducing and focusing the indicators was a central issue in many organisations, especially at the programme level. It was a common experience that there were often too many indicators, they were not concrete enough, and the people responsible for collecting the data required to monitor them were not defined clearly enough.

In practice, programme indicators were prepared and tested, for example, through projects implementing the programme. For example, the project coordinators of *International Solidarity Foundation* systematically went through all the twenty or so ongoing development cooperation projects of the organisation and placed the results level indicators of individual projects through the programme level objectives, and based on those started forming the joint programme indicators.

One idea regarding indicators was that not all the indicators have to be always invented from scratch and it is possible to make use of already existing international indicators, adapted to the needs of the organisation. For example, there was a lot discussion in conjunction with *Finnish Disabled People's International Development Association's* disability partnership programme about utilising international agreements on the rights of disabled people in the programme indicators.

On the other hand, in Finnish Disabled People's International Development Association as in some other organisations, there was also a critical attitude towards the possibility of finding measurable indicators for the objectives. The whole monitoring approach based on measurability and indicators was also criticised. For example, a question was raised about how the empowerment of disabled people can be measured – or "at what stage can we tick the box that this has occurred".

## Developing continuous internal evaluation

In many organisations there was a discussion about the strengths and weaknesses of external and internal evaluations. In larger organisations it was quite common to have an external evaluation in the middle or end of a project, and evaluation was also included in the project budgets from the very beginning.

There were both encouraging and critical experiences about external evaluations. The usefulness of external evaluations carried out with little resources was questioned. An evaluation carried out by an external consultant over a few weeks did not necessarily bring new information and the results and recommendations of the evaluation felt like "everyone knew that already". Nevertheless, there were also positive experiences about external evaluations. Evaluations had produced new information and ideas the most when they were conducted by a person who was an expert on the substance of the project in question. For example, the field workers of *Finnish Overse-*

*as Lutheran Mission* were impressed with the evaluation of the organisation's mental health project in Central Asia which was carried out by a foreign expert on mental health work.

The organisations wanted to develop external and internal evaluation alongside each other. Systemizing internal evaluation and enhancing evaluation culture was a central objective. Monthly feedback discussions were developed to enhance internal evaluation culture, as well as annual feedback seminars to be organised with a partner.

## Working collectively

Experiences and ideas about a new kind of collective work were created as a 'side-product' of the *Evaluation for everyday use* workshops. As t he representative of one organisation stated at the joint seminar:

> *"In recent years we have mostly made the operative plans and reports in a way where each person is thinking by themselves that in my project this and that is happening in development cooperation, and then the global education trainer and communications officer lists their own objectives at their desks, and then they are sent to the director who puts them together. But here we started out from the strategic objectives and started thinking through them what this means on the part of the development cooperation projects, on the part of global education, on the part of communication, and on the part of this kind of general management of the organisation."*

The collective working model was also emphasized in other organisations. The fact that the director and representatives from different operating sectors participated in the workshops brought added value. Through the discussions and collective analysis, it was easy to locate one's own activity as part of the organisational whole, to exchange ideas about monitoring and evaluation tools, and to develop new forms of cooperation between different activities. The widely attended workshops organised in conjunction with staff days were seen as fruitful. For example, participants at *Finnish Refugee Council's* staff day workshop in 2009 gave feedback that discussing the monitoring and evaluation of their own work in relation to the objectives of the organisation helped them to perceive the place of their own work in a completely different way than previously held strategy workshops that were "on an abstract level".

The commitment of an organisation's management to the process was extremely important so that the selected developmental tasks could be taken forward. In some organisations members of the board also participated in the process, while in others the new practices and guidelines were presented to the board. For example, the chairperson of the *Student Union of the Turku University of Applied Sciences* participated in all the workshops although development cooperation is not one of the central activities of the organisation. In some organisations there was also a discussion about extending monitoring and evaluation to the work of the board. Self-evaluation by the board had already been conducted in some organisations.

# Challenges in evaluation

The central challenge in developing evaluation, like in all other developmental activity, is to be able to identify the correct developmental task. The developmental task should be such that it genuinely brings something new, is not too idealistic and is possible to implement with existing resources. The situation facing the organisation should be favourable to the planned change, as was stated by the representative of one organisation during the joint seminar:

> *"We should choose a kind of historic moment that would work, that right now here is an opportunity for us to start developing the organisation in a broad way and thinking about some new perspective."*

The need for holistic thinking and development emerged clearly in the *Evaluation for everyday use* project. Although the original developmental idea may have been about developing a new and handy evaluation tool, it was often the broader themes affecting the whole organisation that emerged as the developmental tasks. For example, it was observed that without clearly defined objectives it is impossible to evaluate their implementation. This observation applied especially to the organisation and programme level, and in the *Evaluation for everyday use* the discussion often ended up being about the organisation's work as a whole and not about details concerning individual evaluation tools or indicators.

> *"The discussions were really rewarding, it was good that we also talked on a philosophical level about what we are doing instead of just concentrating on the practical work."*

The slowness of change was also seen as a challenge in the organisations. Many of the *Evaluation for everyday use* projects lasted one and a half years and in many organisations it was felt that surprisingly little was achieved in this time.

> *"When you open one door quite a few issues that should be taken care of come bursting out, and many issues appear on the agenda. In my opinion our part was painfully slow."*

Research shows that the development of new tools and the adoption and testing of new organisational ways of thinking is a slow process. For the development coopera-

tion organisations, participation in the *Evaluation for everyday use* project and focusing on the change taking place in their own organisations also provided a valuable comparison to the evaluation and monitoring of changes taking place in their partnership organisations. Capacity building projects in the partnership organisations are often expected to radically develop their activity during the three-year project cycle. Being the target of a developmental intervention themselves made it possible for the Finnish organisations to have a personal experience about the dynamics of change.

One of the challenges of developing evaluation in the organisations was the differentiation of the development cooperation projects from other activities. In development cooperation there were often well-defined objectives and agreed monitoring and evaluation practices at the level of individual projects, but the organisation's other activity was not under the same kind of evaluative observation. The shift towards programmatic thinking – like the quality system requirements of the Ministry for Foreign Affairs, for example – has created new types of pressures to include all of the organisation's activity under the domain of some kind of evaluation. Those organisations that had projects funded by the Finnish Slot Machine Association (RAY) also strived to bring together the evaluation tools developed under RAY's sphere and the evaluation of development cooperation.

Integration may be difficult, however, because the monitoring and evaluation requirements of different funders can be different. Development cooperation projects have long traditions of a particular kind of monitoring and particular tools that may not necessarily be integrable with the tools developed by organisations that are not doing development cooperation work.

The second question that was constantly raised was the relationship between the actual work and evaluation; new types of evaluation practices and tools were thought to reduce the amount time available for "real work", such as implementing projects. The lack of time resources emerged especially when discussing the amount of work by country office staff and representatives of the partnership organisations. *International Solidarity Foundation's* field coordinators reminded us that in the field there is a lot to do in the actual project implementation and there is not necessarily time for evaluation. The partners of the *Student Union of the Turku University of Applied Sciences* also expressed strongly in the joint workshop that they would not like any more reporting which was already taking up too much of their time. The problem of time resources also affected participation in the *Evaluation for everyday use* and performing the developmental tasks associated with it. For the staff of the organisations, the developmental work was extra work on top of their other tasks, as described by the representative of one organisation at the seminar:

*"And then there are those 16 projects that should be constantly planned, monitored and evaluated, that practical work in the background. The Evaluation for everyday use resource should have been integrated much more accurately into our own work programme and the whole organisation's work programme, and not been an extra thing on top of all that."*

The third monitoring and evaluation challenge related to documentation and reporting. Although monitoring and evaluation data was collected and evaluation seminars organised, crystallising the data into written and analytical reports was challenging. There was an attempt to ease documentation with different evaluation forms and matrices that were filled in the projects. The problem often seen with the forms was that they mainly reported about what had and what had not been done, but the evaluative part remained insignificant. Answers to questions about what kind of change the project had achieved, what kind of unplanned impacts the project had and what would have been better to do differently, remained inadequate. In addition to the lack of time resources, the difficulty of written reporting was partly also seen as a cultural question.

*"There's a challenge that in many cultures it is difficult to write those analyses when the reports come much later, so there should be some kind of a debriefing session."*

Instead of written and numerical reports, there was a desire for more verbal discussion and stories that are easy for everyone to produce. The problem with verbal debriefing sessions and discussions was the difficulty in documentation. As a solution, in some organisations it was suggested that there could be joint evaluation discussions structured in some way. Documentation could be agreed with two reporters who would not participate in the discussion.

The fourth evaluation problem was identified as a kind of withholding of information and selective reporting. The withholding of information was spoken about especially in relation to the Southern partners. In some organisations it was felt that the partnership organisations collect a lot of information about the projects and beneficiaries but only a part of it is sent to the Finnish partner. In some processes it was observed that the partners did not send the information because it was not specifically asked for and the information was not seen to be interesting or relevant from the perspective of the Finns. For example, information about the everyday life of the beneficiaries could be seen as too insignificant to deliver even though that was exactly the information that interested the Finnish organisation.

There was a lot of discussion about the need for information during the *Evaluation for everyday use* processes. From whose information needs does the monitoring and evaluation start from? In the target countries evaluation based on the accountability motive was emphasized in situations where it was thought that the information was specifically being collected for the needs of the Finnish organisations and Finland's Ministry for Foreign Affairs.

It was observed that there was a need to develop the evaluation capacity of the organisations both in Finland and the partner countries. Evaluation know-how could also be very uneven inside an organisation and dependent on the training and experience of individual people. In addition to know-how, developmental challenges were seen in the attitudes related to evaluation. The high turnover of workers and people in positions of responsibility was a challenge especially for the organisations operating on a volunteer basis, but also in organisations where people were in salaried employment. In the organisations there were many fixed-term trainees and the permanent staff moved from one organisation to another.

As is typical in developmental projects, the participants to the *Evaluation for everyday use* project also felt that the developmental process remained unfinished and that the developmental tasks were not completed. Although the organisations were motivated to complete the developmental task and committed to collective work, the developing was often trampled by everyday work, especially when the external facilitators were no longer there to set timetables.

> *"We moved forward in the process but we didn't make it anywhere near the destination!"*

> *"Maybe I should take a photo of the facilitators and put it on the wall as a kind of threat. If only other things could also be achieved so efficiently, because when your presence weakened, then of course our momentum slowed down a little too."*

Participation in the developmental project gave the organisations useful experience in being the target of a developmental project, and about the slowness of developing their own organisations. This experience provides a realistic point of comparison to the expectations that exist in development cooperation projects towards Southern partnership organisations and regarding change in their way of doing things.

# Evaluation for everyday use project as KEPA's activity

The *Evaluation for everyday use* processes in 2009 and 2010 developed a new service form for KEPA related to organisational development and the development and support of the member organisations by going directly to the organisations and analysing their individual activities. The organisational development processes are a continuation of KEPA's training and project advice activities. KEPA's project cycle training deals partly with the same issues as the *Evaluation for everyday use* project. An organisation's developmental process differs from training in that it involves more workers and management from one organisation, whereas in the training usually 1-2 people participate at one time. It is easier to take ideas for change forward in an organisation when they have been collectively produced. In particular, the fact that KEPA's facilitators and the management and workers of the organisations participated continuously in the cooperation work increased the effectiveness of the developmental work for individual organisations.

The ownership of the developmental projects was in the hands of the organisations and it was from their activities and discussions that the contents, examples and priorities of the projects emerged. In May 2009 KEPA's workers carried out a mid-term review in the project. In this evaluation it was calculated that during the first six months KEPA's workers had used 101 hours in the workshops, whereas the contribution of the organisations was seven-fold at 718 hours. In the early stage of the project, KEPA's work contribution was required in planning. Implementing the concept developed in the final stage of the project with the new round of organisations did not require a similar contribution in terms of planning.

The things learned from the pilot developmental projects started in 2009 were utilised in the planning of the processes for 2010. In terms of the progress of the developmental work, two relevant issues emerged: the scheduling of the workshops and the tasks set between the workshops. It was a good idea to organise the first three workshops focusing on analysis over a short time period, for example one week apart, so that the analysis moved forward continuously and there was no need to spend time on reminders about the previous workshop. It would be good to hold the workshops on new ways of doing things or the adoption of guidelines no earlier than 6-12 months from the fourth workshop. *International Solidarity Foundation* and *Finnish Refugee Council* were involved in the project for more than a year but even their pro-

cesses did not reach far enough to deal with their actual experiences about the adoption new ways of doing things or guidelines.

The tasks between workshops, where the participants themselves answered certain analytical questions, helped the participants to "maintain" the developmental process. Reporting from the workshops could be added to the tasks. Now the task of making notes, summaries and workshop reports was often left to KEPA's facilitators, which did not necessarily increase the organisations' ownership of the issue but was often mentioned as a good service.

All in all, the participating organisations saw the *Evaluation for everyday use* processes as rewarding and interesting, although the majority thought that the process had still remained "incomplete". KEPA's external facilitators had an important role in creating spaces for workers from different parts of the organisations to participate in the joint discussions and the preparation of collective practices. The pre-arranged times for the workshops were kept in almost all the organisations.

> *"Thank you KEPA, I have to say that we received very high quality work absolutely free. Often you have to pay for consulting work that is not necessarily high quality at all. In this case the umbrella organisation really earned its umbrella organisation spurs."*

KEPA has continued to implement the *Evaluation for everyday use* concept in new organisations in 2011. Within KEPA, participation in the project was carried out in pairs so that more workers gained experience about the structure of the project, and the implementation of the concept could be continued flexibly despite changes in personnel.

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# Useful links

**Good introductions to monitoring and evaluation**

BOND How to Guide Monitoring and Evaluation
http://bond.org.uk/data/files/microsoft_word__monitoring_and_evaluation_how_to_guide_july_2010.pdf

Monitoring and evaluation material on KEPA's website
http://www.kepa.fi/toiminta/koulutus-ja-kapasitointi/taustamateriaalit/seuranta-ja-arviointi

Bakewell, O. et al. 2003, Sharpening the Development Process. A Practical Guide to Monitoring and Evaluation. INTRAC. Praxis Guide No. 1.

Roche, C. 1999, Impact Assessment for Development Agencies. Learning to Value Change. Oxfam, Novib: Oxford

**Approaches and methods**

Kenen ehdoilla? Osallistaminen kehitysyhteistyössä
Hanna Laitinen 2002 KEPA

Sosiaali- ja terveysalan järjestöjen arviointitoiminnan JÄRVI-toiminta
http://www.jarjestoarviointi.fi/

Most Significant Change
http://www.mande.co.uk/docs/MSCGuide.pdf

Outcome Mapping
http://www.outcomemapping.ca/

**Evaluation of advocacy work**

O'Flynn, M. 2009, Tracking Progress in Advocacy: Why and How to Monitor and Evaluate Advocacy Projects and Programmes. INTRAC.
http://www.intrac.org/data/files/resources/672/Tracking-Progress-in-Advocacy-Why-and-How-to-Monitor-and-Evaluate-Advocacy-Projects-and-Programmes.pdf

**Evaluation of impacts**

O'Flynn, M. 2010, Impact Assessment: Understanding and assessing our contributions to change. INTRAC.
http://www.intrac.org/data/files/resources/695/Impact-Assessment-Understanding-and-Assessing-our-Contributions-to-Change.pdf

**Other useful links**

MANGO taloushallinnon itsearviointityökalu (Finnish translation)
http://www.kepa.fi/toiminta/hankeneuvonta/taustamateriaalit/taloushallinnonitsearviointityokalu

Ministry for Foreign Affairs monitoring and evaluation guidelines
Evaluation guidelines – Between past and future
http://formin.finland.fi/public/default.aspx?contentid=105900&nodeid=34606&contentlan=1&culture=fi-FI

ActionAid's Accountability, Learning and Planning System (ALPS)
http://www.actionaid.org/sites/files/actionaid/alps2011_aug11.pdf

# Appendix 1. Participating organisations

Finnish Refugee Council (2009-2010)

National Union of University Students in Finland (2010-2011)

Student Union of the Turku University of Applied Sciences, TUO (2009-2010)

Finnish Overseas Lutheran Mission (2009)

Adventist Development and Relief Agency (2009-2010)

International Solidarity Foundation (2009-2010)

Finnish Disabled People's International Development Association (2010)

Interpedia (2010)

Taksvärkki (2010)

Student Union of the University of Helsinki (2010)

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## Towards Evaluation for Everyday Use!

The Finnish Service Centre for Development Cooperation KEPA implemented the pilot phase of the *Evaluation for everyday use* project with ten organisations in 2009-2010. The objective of the project was to make evaluation more of an everyday process and to start a collective learning journey with Finnish organisations working in the field of development cooperation. The purpose was to analyse together what is the current state of evaluation in the civil society organisations, what kind of challenges it involves and how it could be improved. The purpose of this report is to bring out, based on the developmental projects, the common challenges related to evaluation and the solutions developed in the projects for more general use. The report also describes the method of the Evaluation for everyday use project which can also be used by organisations to develop themselves..

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