

Tools for measuring change: self-assessment by communities

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Introduction

With increasing demands on development programmes to demonstrate the impact of their work, a number of German NGOs initiated a process of collaboration with partner NGOs in Africa and Asia. They sought solutions amid concerns that many participatory tools currently in use lead to monitoring systems that serve only for donor accountability, but neither add value for poor people nor for the implementing NGOs because they do not improve effectiveness on the ground.

NGO-IDEAs¹ is a collective of NGOs that developed impact monitoring tools for learning, management and reporting while involving grassroots communities. This article describes the effects of implementation with communities. It also describes the process of an NGO collective creating such tools and spreading them to its members.

The NGO collective

NGO-IDEAs worked in two phases. The first phase from 2004 to 2007 in South India developed a first version of the Impact Toolbox for programmes with savings and credit groups in South India. In the second phase from 2008 to 2011, a group of 14 German NGOs in cooperation with about 40 NGOs from South Asia, East Africa and the Philippines extended the approach to other regions and sectors. A team of five consultants from four countries supported the process. At the end of the second phase, a number of 'how to' guides for assessing outcome and impact were published. The external funding of NGO-IDEAs by the German Ministry for Development ended in early 2012, but NGO-IDEAs continues in Germany as a process with a group based in VENRO,² the German development NGO coalition. It continues in developing countries

¹ NGO Impact on Development, Empowerment and Actions (IDEAS). For more information about NGO-IDEAs, its concepts and values see: www.ngo-ideas.net/publications. NGO-IDEAs also developed a manual to develop impact-oriented monitoring systems (*Monitoring self-effectiveness*) and a set of lean PRA tools that assist in one-time impact assessments (*Tiny tools*).

² For more information see In Touch, this issue and: venro.org/english/whoweare

Box 1: The NGO-IDEAs concept

The basic idea is simple:

- people set themselves goals or targets
- from time to time they measure who achieves these goals and to what extent
- people analyse the trend of change, and who/what contributes to it
- people decide what they should do next to achieve their goals

Mostly, but not necessarily, this is done in peer/self-help groups. The data generated can be collected by development programmes to reflect and report on impact. It can also be used to improve performance of local government.

through the cooperation of local NGOs in East Africa, the Philippines and South Asia, as well as an emerging new project in Latin America.

Many practitioners felt that solutions were needed that are more relevant for community groups and NGOs. The tools developed by NGO-IDEAs aim to address these issues. They focus on participatory impact-oriented management, designed as 'everyday tools' which are transformative and focus on the intended change. They are about self-effectiveness; the difference that local people, community-based organisations and NGOs want to see happen. The tools are designed to empower their users and increase their awareness of the change happening around them and to develop strategies to enhance desirable change.

A particular focus is on the use by poor and vulnerable people – the tools can easily be used to differentiate change for distinct social groups. In order to achieve that, NGO-IDEAs uses participatory impact assessment processes which facilitate community learning. They help community groups clarify and develop their own goals, beyond just thinking in terms of activities. This involves a change in mindset. The process of mutual understanding, exercises and validation often needs a time period of a few months, until the community is happy with the goals it has set (see Box 2).

Box 2: NGO-IDEAs tools**Participatory well-being ranking (PWR)**

In a process involving the community and key informants, households are clustered according to criteria for well-being. The tool gives information about the village-specific poverty stratification which can be used for project planning, as baseline data and for target group selection and for the socially differentiated analysis of change.

Situational assessment and goal establishment (SAGE)

Groups develop goals for their members (individuals and households); they monitor how the individuals perform in relation to these goals, and analyse the performance immediately in a group discussion. Reflection on the outcomes, as well as the planning and activities, are integral parts of this tool.

Participatory assessment by groups (PAG)

Groups develop goals for the group as a whole, and monitor how they perform in relation to these goals. Analysis, reflection and planning are designed as in SAGE.

Participatory impact analysis and reflection (PIAR)

Data from PWR, SAGE and PAG are consolidated and analysed at programme or NGO level. Data from other tools and sources are compared with this. Further elements of the tool are a reliability check of the data, cause-effect analysis and steps for programme adaptation.

Working with indigenous groups in the Philippines

One example is Kapwa, an organisation working with indigenous people on the Philippine island of Mindanao. Kapwa introduced the NGO-IDEAs tools to Bagobo Tagabawa, indigenous people in Makilala who farm in remote mountainous areas. The clan representatives agreed common goals for all the 149 households involved. Clan members scored themselves in group discussions. They used a simple yes/no scoring for the goals. Goals were clustered as social/cultural (including health), economic and political. Goals included:

- We have a written development plan for our family (2010: 10% yes, 2011: 24% yes)
- We have increased our household income (2010: 51% yes, 2011: 72% yes)
- We send our children to school (2010: 68% yes, 2011: 82% yes)
- We take our children to the health centre for immunisation (2010: 56% yes, 2011: 74% yes)

Table 1: Immunisation of children: contributing and hindering factors

	Community contribution	The project's/NGO's influence	Other external factors
Contributing factors	Parents bring their 0–5-year-old children to health centre for immunisation.	Linkage to rural health unit and training of health volunteer from the tribe. Support during training such as fares, food and materials.	Department of Health immunisation programme for children 0–5 years old.
Hindering factors	Some parents stopped bringing their children for immunisation because the children developed a fever afterwards.	Limited number of staff handling multiple project components.	Only one midwife is assigned to take care of several villages, affecting the quality of service.

Source: Presentation by Alma de la Paz, Kapwa, July 2011 in Cebu, Philippines.

• We participate in meetings and common clan activities (2010: 59% yes, 2011: 88% yes)

The differences in one year show clear progress. For example, the number of households with increased income grew; the number of children immunised and sent to school increased. According to Kapwa staff, the monitoring tools sped up this development. People learnt to progress their goals more clearly. Leaders were able to see progress and how to improve performance. Both farmers and Kapwa staff became more aware of results and could better use opportunities to improve livelihoods. All this was observed both by Kapwa staff and by community members themselves. Kapwa had used participatory assessment tools before to encourage reflections, but in their experience, the NGO-IDEAs tools helped to structure analysis better. A challenge for Kapwa was to find the literate leaders who could facilitate the process and document the results. Initially, clan members tended to give the same answers as clan leaders. It took time and patience to convince people that each household member was to be assessed according to their situation. Such competences had been more difficult to build in previous communities that Kapwa worked in. At the same time, people did not accept all that was brought in by Kapwa. Kapwa had suggested a goal that early and multiple

marriages were to be discouraged, but that was not agreed by the clan representatives.³

Part of the analysis at both clan and NGO levels is a reflection on what influences contributed to the observed change. Like Kapwa, many NGOs used a table with a layout similar to Table 1 above.

Working with pre-schools in India

Another example comes from Ramakrishna Mission (RKM) Ashrama in Narendrapur, near Kolkata in India, applied the NGO-IDEAs toolbox in an early child education project in five districts. With parent-teacher groups, RKM established goals at two levels:

- learning objectives for the children; and
- behavioural/supporting objectives for the parents to improve these learning objectives.

These goals were discussed in detail and set by the parent-teacher groups who also set the goals for their pre-school children.

Some learning objectives for the children included:

- I will obey the teachers' guidelines.
- I can tell stories, rhymes etc.
- I can recognise animals, birds, flowers, fruit, vegetables and vehicles from pictures.
- I can identify vowels and consonants in the Bengali alphabets.
- I will wash my hands with soap before eating food and after going to the toilet.

³ For more details, see Brenner (2011), pp. 8-12.

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...	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	14	56%	
SUB-TOTAL																												260	58%
OTHERS:-																													

Example of a chart showing the children's performance. Note the total scores for each child (last line) and for each learning objectives (last two columns) which include a percentage calculation.

Some behavioural objectives for the parents included:

- I will send my children to school regularly and on time.
- I will send my children to school clean and tidy.
- I will provide the necessary teaching materials regularly for my children.
- I will regularly monitor my child's progress in health and education.
- I will try to understand the course curriculum of the centre.

Dos and don'ts for the teachers:

- I will arrive at the centre before the scheduled time.
- I will maintain a friendly attitude with the children.
- I will use child-friendly methods of teaching.
- I will teach the children using practical demonstrations.
- I will communicate with the children's families at regular intervals.

The results of the first assessment above show the status of each child, parent and

teacher against their set goals/objectives.

For each goal, the percentage of children achieving this goal was calculated. To analyse the assessment, the following questions were discussed:

- What contributed to the achievement of this goal?
- What hindered the achievement of this goal?
- What actions are required at different levels?

After the goal setting and the first assessment, participation improved. RKM observed a number of remarkable changes in the children, such as:

- Increased participation of children, e.g. they were now more active and attentive.
- Improved children's personal hygiene, e.g. children came dressed in cleaner clothes and washed their hands as a matter of course.
- Improved learning, e.g. before, some children could only name one or two flowers; afterwards they could easily name five.
- Before applying the toolbox, many chil-

Box 3: More case studies

Dipshika, an NGO in Bangladesh that works with families, not groups, has integrated the tools into their family approach. After joining the programme, families develop a vision. Since the NGO-IDEAs tools were introduced, each family also develops concrete and specific goals, although many goals are common amongst most families, like increased savings, the start of new income-generating activities, rearing cows and only drinking safe water from the well. A cluster of families comes together occasionally to assess their performance. Dipshika found that the process 'creates self-motivation, confidence, responsibility, self-initiative and ownership of development among the family members. It creates participatory decision-making in the family' (Islam, 2011, p.7). As a consequence, Dipshika field workers experienced a growing sense of responsibility and it became easier for the supervisors to identify in which sectors they needed to intervene. Dipshika has since introduced the tools to thousands of families in various projects, and is in the process of introducing it to other organisations in Bangladesh.

The Catholic Diocese of Embu in Kenya has an agricultural development programme that started introducing both well-being ranking and the goal-setting tools SAGE and PAG in 2009. By 2011, 30 groups had applied the tools. Many families had moved up one step in the well-being ranking by then. The neediest households had been identified, and group members supported them e.g. with preferential credit from group saving schemes, and by identifying economic opportunities for them. Savings and loan repayments had improved. Members understood better where they stood and what could contribute to improvement (Brenner, 2011, pp.13–19).

Tambayan, an organisation in Davao, Philippines, has introduced the tools with gangs of street children they work with. They found that establishing goals with a new gang requires many days of patient work with much interaction and fun exercises in between. After a few weeks, once the children have agreed their goals, work with them becomes much easier than without the goals, and Tambayan found that the children could be reintegrated faster than with other gangs before. Many gangs set goals like 'harmony in the family' which caused Tambayan to include the families in their work, which again enhanced the process of integration (Causemann, 2011, p.75).

dren came to school late. After this exercise, most came on time.

- Before, their attendance was irregular, afterwards it was daily.
- Before, the children got no help with their learning at home. After the first application, mothers started helping their children with their homework.

All these immediate effects are valued highly in the local context, and they do indicate that children benefit more from the pre-schools.

The mothers of the erratically attending children also started to involve their husbands in sending their children to the centre. Parents became increasingly involved in the network of centre, children, teachers and the CBO. The staff members noticed a hidden but healthy competition among the parents to achieve the goals they had defined and agreed.⁴

Dynamic fit in the communities

The question emerged: what made the NGO-IDEAs process successful? Why did about 850 groups apply the tools, instead of the 90 groups originally planned? There are several reasons. Seven critical elements worked together in a specific way – in what Bagadion (1999) calls a 'dynamic fit':⁵

Situational analysis: discussing goals is coupled with an analysis of reality. People become more acutely aware of the situation they live in.

Setting goals: people become more determined to do something to achieve their goals.

Responsibility: as these are their own goals, people take more ownership and become more responsible in achieving them.

Rating and comparison: assessing which goals they have achieved more in (or less) requires thorough thought. This empha-

⁴ Dolai *et al.* (2011).

⁵ 'Success proceeds from the way in which the variables interact to achieve a **dynamic fit** or **dynamic equilibrium**, i.e., the synergy of variables relating to and changing or adjusting with each other to bring about the desired outcome.' Bagadion (1999).

sises their importance and goals are better understood.

Reminder: coming back after some time to discuss the goals again (for validation and rating) and a second rating emphasises the importance of the goals.

Legitimisation to act: as these are jointly agreed goals, group members feel they have a right to pursue them, even when other community members disagree. The groups nurture their social relations. They build trust and support each other.

Nurturing social relations: the groups build trust and support each other.

The tool development process

The tools and their various adaptations were developed in an iterative action research process and in different sectors. CBO federations started applying the tools for their own purposes.⁶ Hundreds of NGO staff members participated in developing the tools and reflected upon the effectiveness of their work. Development work has become more meaningful, satisfactory and people-centred. Members of more than 10,000 households in 850 groups were involved in developing and working towards their goals by September 2011.⁷ They have been assessing themselves in relation to these personal and group goals. They have learnt, given feedback and contributed to an evolving body of experience. Over time, they became more focused, and mostly proud of the progress they measured.

But this was not easily achieved. It often required a re-orientation of the development approach and the monitoring and evaluation (M&E) system. Introducing a new tool required more than just staff and finance. It required a participatory way of working which accepts that the responsibility for setting priorities lies with the community and the individual households. That has been a re-learning for many NGO

workers involved. It required trial and error, perseverance, learning from failure and accepting guidance. Some had to learn the principles of participatory rural appraisal (PRA) anew. But it was also visible from the beginning that there was something in it that was worth it: the increasing commitment by the NGOs – and the spread to many more groups – was beyond expectations as evidenced by reaching almost tenfold the number of groups targeted. Reports from many NGOs showed that staff realised that this way of working was more rewarding. A Ugandan NGO M&E officer put it this way: ‘We are now emphasising bottom-up. Gone are the days when we did top-down.’

Before all this could be achieved, there were resistance, complications and problems that are worth analysing. One challenge was that tools developed in the savings and credit sector in South India had to then be applied in different sectors, countries and cultures. How would the tools work? And how would NGO staff adapt them? The process showed that many people preferred to take small steps, not to change everything but seek situations that were most similar to what had worked elsewhere. Many started with their savings and credit programmes, their group-based programmes, in rural areas, and then transferred it to other contexts. Many waited for a few innovators to start in a new context, and then adopt how it worked there. We came to realise in the process that people learn on different levels:⁸

- **Adaptive learning:** people and organisations learn to apply something that they have been taught or have seen elsewhere, in as identical a form as possible (how most organisations applied well-being ranking, SAGE and PAG).

- **Reflexive learning:** people and organisations apply what they have learnt to other situations on a needs basis, transferring

⁶ Causemann *et al.* (2011, p.76).

⁷ NGO-IDEAs (2012, p.8) based on Ritthaa (2011, p.6).

⁸ GTZ (2009, p. 215).

Box 3: Sectors where the tools have been applied

The goal-setting NGO-IDEAs tools have been applied in the following sectors or target groups:

- Agriculture
- Commercial sex workers
- Community development
- Community housing
- Early childhood education
- Indigenous people
- Mangrove protection
- Peace work
- People with disabilities
- Pregnant and breastfeeding mothers
- Savings and credit groups
- Street children
- Water provision

experience from one situation to another. With well-being ranking, SAGE and PAG many did this, but we could see the difficulties, and often people applied tools in a way that was not yet adapted, ran into difficulties, and then overcame these problems on their own or with guidance from the consultants. Reflexive learning often requires peer or external counselling.

• **Reflected learning:** people and organisations plan what they need to learn based on past experience and expected future challenges. They design their data collection and training for this purpose. Some organisations had to think deeply about the tools and completely revise them before even starting their first try. That resulted in significant innovations.

Challenges for NGOs in working on figures

The 'participatory numbers'⁹ that the NGO-IDEAs tools generate are produced and analysed by target groups themselves. At grassroots level, people are usually able to easily interpret the findings. But NGOs also collect this data for in-depth analysis. Experience shows that there are several challenges. Many NGOs are not experienced in dealing with figures. Many of their staff are not 'numbers people' – they prefer to look at social or technical issues, not at

figures. Few have a thorough training in quantitative data processing. They are skilled in other fields. And the finance people know figures but are often not familiar with the programmes. So if it is difficult to get good quality figures, how can we improve? And how much data should we expect?

Two skills would be needed in the NGOs: to ask the relevant analytical questions and to deal with figures in their various aspects. In order to gain such skills, NGOs would need to employ expensive and highly skilled staff. Another possibility is to invest in external support for developing the relevant analytical questions and training staff, and not all staff members want to learn that; after all, they want to work with people, not paper. But a number-competent staff member will easily find better paid employment elsewhere after the training.¹⁰ NGO-IDEAs has therefore developed a way of generating lots of numbers, but wise decisions need to be made where to collect and analyse them in detail, and where rough summaries could suffice.

Dynamic fit of NGO-IDEAs as a process

Why did so many organisations actually stick to NGO-IDEAs when they had the opportunity to drop out from a process that was initially difficult? The collective NGO-IDEAs process involved a number of critical elements that altogether made things move, a dynamic fit of the process itself:

- Clear expectations from German NGOs regarding participating partners in the global South to improve their impact monitoring systems in the context of NGO-IDEAs, i.e. to honour their commitment.
- Commitment of regional partners to really achieve something; the selection of motivated partners was crucial, but a general environment helped in which organisations saw the need to report about impact as a means to attract further funding.

⁹ Chambers (2008), Holland (2013).

¹⁰ For a detailed analysis of the challenges with numbers, see Causemann *et al.* (2011, p.77).

- Regular exchanges with regional partners at regional workshops and training courses.
- Benefits already visible to target groups at an early stage (see dynamic fit at the group level).
- Accompaniment by the consultants: a continuous open and joint reflect-to-improve-process, to motivate and to synergise. The process needed accompaniment over three years, and that was sufficient only for mainstreaming it into some of the organisations, not in all.
- Freedom to innovate and high flexibility in the project implementation (e.g. many more visits to partners were possible than originally planned).
- Reflections, exchange and guidance given by German partners, particularly the steering group.
- Nurturing relationships throughout all the structures and processes to develop trust, open exchange and bonding (i.e. working on stable relationships, making room for formulating concerns, having different opportunities to meet and reflect jointly). This was crucial in encouraging people to persevere.¹¹

Part of the dynamic was possibly that the German NGOs had their own process in NGO-IDEAs where they improved and refocused their understanding of how to work on impact. Apart from training courses conducted for German NGO staff, a working group based in VENRO developed a policy paper on impact monitoring that included the empowerment of target groups as one of the purposes of monitoring systems, which triggered quite some debate (See *Quality before proof*, In Touch section, this issue).

As for the future, it remains to be seen how the tools will spread if not all elements of the dynamic fit are in place. Currently, many organisations continue to use the tools within their own organisations and to spread them to other groups and projects. But very few invest in spreading the tools to other partners, or other countries.

Box 4: Countries where the tools have been applied

- Bangladesh
- Ethiopia
- India
- Kenya
- Philippines
- Tanzania
- Uganda

At the time of writing, there are also plans to introduce the tools in Afghanistan, Pakistan, Sri Lanka and in a couple of Latin American countries.

Conclusion

The NGO-IDEAs experience shows that poor people can bring about change, and they can accelerate change massively if they have the opportunity to measure it with effective concepts and if they are supported by programmes that take up their concerns. The awareness of changes in attitude and behaviour encourages them to take on ever more difficult challenges. Building on this, they reach out to others and they can finally make local government more accountable – and even make this one of their goals.

For the involved NGOs, however, there are more benefits. The NGO-IDEAs tools are not only useful for collecting data but also for empowering communities in the process of data generation and reflection. With the NGO-IDEAs methodology, poor and marginalised people understand and act on contextualised meaning. If this is assured, the NGO-IDEAs tools contributes to a more accurate measurement of change by providing differentiated data on who benefited most from it: e.g. women and men, or households below and above the poverty line. Data can also be analysed separately for groups such as migrants or people living with disabilities. This data is group validated and documents a process over time. And it is comprehensive. ‘Coverage of all project beneficiaries makes the NGO-IDEAs toolbox more rigorous than many research methods’ (Chambers, 2013, p.199).

- The methodology integrates measuring

¹¹ Another process that, running independently, had similar elements was the Most Significant Change process of EED partners in Zimbabwe 2008–9 (Ndlovu, 2010).

outputs, outcomes and impact. By looking at longer-term changes and loosening the chain of attribution to a project intervention, the initiative empowers local communities to analyse and act on their own understanding of cause and effect, which goes well beyond the confines of the logical framework planning tool.

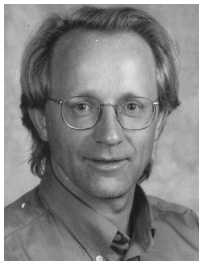
- It does not start from ‘top-down’ planning, but people’s individual goals are consolidated into community goals and can be consolidated further.
- The ‘theory of change’ (i.e. the logics of attribution/contribution) is not linear or led by planning logics, but is systemic and asks for contributions and hindrances of the community, NGO and any other actor, led by empirical observation.
- This means that both the community and the project staff analyse who the teams are, whether they playing against or with them, and how that helps or hinders them.
- While the NGO-IDEAs tools go beyond logical frameworks, the data can nevertheless be used easily for accountability purposes.¹²

Empowerment and awareness-creation mean more than democratic participation. Although democratic participation is

required in the context of self-help promotion, NGO-IDEAs demonstrates this much more than just consultations: all project activities can contribute to the empowerment of the poor and marginalised; and specifically, the outcome and impact monitoring can serve as an eye-opener, creating new awareness about the results of their own actions (i.e. their self-effectiveness) and helping to improve it. At the same time, the visibility of changes at community and NGO level is continuously improved, from the start of the project.

Two kinds of synergies emerge with the NGO-IDEAs approach.¹³ Firstly, it often improves data collection for conventional ends: in other words, participatory data collection produces higher quality data in some fields than standard extractive methodologies. Understanding the context leads to a higher accuracy of data and learning processes increase the level of accountability. Secondly, continuous sharing between two autonomous monitoring systems (the NGO-IDEAs system of the groups and the NGO’s own system that cannot rely only on these data) contributes to mutual learning and bridge-building.

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¹² How to create a link between the data created and logframes is described in Gohl *et al.* (2011b).

¹³ For more details on the synergies and the trade-offs involved, see Causemann *et al.* (2013, p.120).

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