

**EVALUATION OF THE PARTNERSHIP
PROGRAMME AGREEMENT (PPA)**

between

**DFID
and
INTERNATIONAL SERVICE**

EVALUATION REPORT

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Contents

		Page
1.	Executive Summary	3
2.	Introduction	4
3.	Methodology	5
4.	What is International Service?	6
5.	Results 1- The PPA Objectives	7
6.	Results 2- Assessing IS's Overall Performance	14
7.	Issues Arising	19
8.	Conclusion	23
9.	Next PPA - Recommendations	25

Appendices

A. Evaluation's Terms of Reference

B. Evaluation Methodology

C. PPA Objectives: Assessing Implementation
 Summary Profile of DWs
 Analysis of Programme Themes

1. Executive Summary

1.1 This is the report of the external evaluation of the PPA between DFID and International Service. It was conducted between April and August 2004 and involved a review of all relevant IS documentation relating to the achievement of the Agreement; interviews with staff; the analysis of existing data in new ways; and the identification of critical issues.

1.2 Overall IS has done what it said it would do. The first three PPA Objectives have been achieved through the successful implementation of the fourteen planned strategies. Objective Four achieved more than the original expectations.

1.3 The two main weaknesses relating to strategy implementation are the lack of growth in development worker numbers, and measuring outcome and impact. The first was primarily due to lack of financial resources. The second is being addressed through the development of a new, and comprehensive monitoring and evaluation system.

1.4 There is sufficient evidence for the evaluation study to conclude that IS's programmes are making a significant difference to the effectiveness of their partners, and consequently to the improvement of the lives of some of the world's most disadvantaged people.

1.5 Six performance criteria were used to assess IS's overall organisational performance. It performed well on all these criteria..

1.6 The terms of reference for this evaluation had four components, and the evaluation concluded:-

- Progress made towards the PPA objectives- these have almost fully been achieved and with IS having adopted a capacity building approach in all of its programmes.
- Added-value- there is a distinctive IS approach to poverty reduction, namely working through organisational and institutional development with partners and civil society agencies. IS has worked closely with DFID in Bolivia, Brazil and Palestine and has benefited in the UK from DFID's inputs into PPA planning and reporting. Analysis of the PPA funding shows that it has been used in a cost-effective way. The majority of the income (87%) has gone to programme activities in the field.
- Monitoring and Evaluation- over the PPA period IS has invested significantly in the design and implementation of a new M&E methodology. The evaluator is confident that in the next PPA period outcomes, indicators and impact will be measured and reported on systematically.
- Future relationship- IS has the organisational capacity in terms of staff competence, systems and motivation, to grow. The demands from partners and the on-going needs of beneficiaries, justifies growth.

1.7 The report's recommendation to DFID is that during the life of the next PPA it should give increased funding above the rate of inflation, and to a level comparable to other successful volunteer-sending agencies.

2. Introduction

2.1 This is a report of an evaluation conducted by an external consultant of the Programme Partnership Agreement (PPA) between DFID and International Service (IS). The current four year PPA will be completed at the end of this financial year, and so it is an appropriate time for those involved to assess the impact of the agreement on IS, and how the relationship with DFID has been experienced. The purpose of this evaluation review is also to make recommendations for the development of the relationship beyond the life of the current PPA (the evaluation's Terms of Reference are shown in Appendix A).

2.2 In 2003 International Service celebrated its 50th anniversary. Formally known as the 'United Nations Association International Service' it was the first 'volunteer-sending' organisation in the UK. It evolved into a development agency concerned with promoting capacity building, human rights, and empowerment and works with some of the poorest communities in South America, West Africa and the Middle-East. It received block grants from the British government in the 1970's and 80's while the first discussions about a Partnership Agreement began in 1998 and the current 4- year agreement runs from 2000 to April 2005. The foundation of the agreement is IS's 5 year Strategic Plan which covers the period 2000 to 2005.

2.3 An important component of IS's strategic thinking is the regular monitoring and review of its progress to the achievement of its organisational goals. As part of this process IS has reported in 2002 and 2003 on the PPA objectives. This evaluation report is an addition to this on-going process. It provides an opportunity for the two main groups of stakeholders (i.e. for IS- its trustees, staff, partners, and development workers; and for DFID -the staff of the Information and Civil Society Department) to work with an external person to review achievements. This external evaluation should not be seen as a 'school inspection', but rather an opportunity for these stakeholders to have an outsider reflecting back to them the things he has been told. In particular the answers to three simple questions: Did IS do what it said it would do? Has it made any difference to poor people? And were its strategies the right things to be doing?

2.4 Thus though the conclusions of this evaluation will form part of the negotiation for the next PPA its greater value lies in whether it helps IS and DFID to increase the efficiency and effectiveness of the relationship. To this end the evaluator has been conscious that certain questions need to be answered: for DFID the key ones are- what is IS's comparative advantage? What are they especially good at? Who can they reach or partner that others can't? What is it specifically about the PPA relationship that adds value to the development process? And what long- term difference does the work of IS really make to the lives of poor people? These questions have relevance to IS but also: where has organisational learning taken place? How has the monitoring and evaluation system supported this learning? What are the organisational and funding issues that are constraining effectiveness? And how can a new partnership agreement help to increase IS's impact on the lives of disadvantaged people?

2.5 The findings of the evaluation are presented in Section 5 and are structured around the PPA Objectives; Section 6 uses a set of criteria to make an overall assessment of IS's performance; Section 7 discusses key issues; and Sections 8 and 9 draw conclusions and makes recommendations to IS and DFID.

3. Methodology

3.1 With the agreement of DFID's Civil Society Department, International Service commissioned Max Peberdy to act as the external evaluator. This consultant is an independent evaluator and facilitator who has worked extensively in the NGO development sector. He has conducted a number of mid-term and end of programme evaluations for DFID, and has worked as an organisational development consultant and trainer with IS. The evaluation process took place between April and August 2004.

3.2 The core of the methodology was a review of all IS's documentation relating to the achievement of the PPA, especially monitoring and evaluation reports relating to programme work overseas and in the UK; it also involved interviews with IS staff; the analysis of existing data in new ways; and the identification of issues and the challenging of assumptions. The evaluation did not involve an overseas field visit, nor the collection of any new primary data, but made a thorough review of evaluation reports that had been conducted on the country programme work. Appendix B outlines the Methodology process.

3.3 As referred to above (para 2.3) the approach taken in this evaluation was not that of a school- inspection which IS has to 'pass' to get another PPA. The process has been undertaken in a very open and transparent way that involved sharing with the evaluator the things that have gone well and those which have been less effective. Thus the ownership of the findings by IS is high.

3.4 An important part of this process was the opportunity for IS to comment on early drafts of this report and to debate with the evaluator his perceptions and conclusions. This was a vital part of the process. It was not always a comfortable process but it has resulted in a greater level of clarity as to the important issues that need addressing in the PPA. This is not to say that both IS and the evaluator will weight all the findings in the same way but overall IS do 'own' the conclusions and recommendations. Thus there is a good chance that this evaluation will enable IS to further strengthen effectiveness, and not merely be a 'thing you have to do for funders'!

4. What is International Service?

4.1 Before discussing the findings of the evaluation it may be helpful for readers of this report who are 'outside' IS to have an understanding of what the organisation does and what it is particularly good at doing. DFID are keen to understand IS's distinctive competence and so, though this summary is jumping ahead of the findings that are presented later, it will assist in understanding the detail if an overview is presented first. What follows is the evaluator's own distillation.

4.2 IS's identity can be characterised as:-

- A long established agency that sends personnel to other countries to contribute to development programmes.
- Recruiting these personnel from many different countries (including from within region)
- Employing development workers (DW's) who are highly educated and experienced, and selected because their skills specifically match the organisational needs of the employing organisation.
- Working with, and through, local partner organisations who, in turn work with poor and disadvantaged people.
- Maintaining about 70 development workers who provide knowledge and skills in specific technical areas and expertise in strengthening the effectiveness of their employing organisations.
- Having programmes in 5 countries (Brazil, Bolivia, Burkina Faso, Mali and the Occupied Territories) with new work in another two (Chile and Togo).
- While in the UK it uses its direct experience of working to combat poverty and injustice to increase public awareness of key development issues, and to inform and lobby decision-makers in order to bring about policy change.
- More recently it has made an organisational commitment to evaluation and learning to ensure even greater programme effectiveness.

4.3 IS's distinctive competence can be understood as:-

- Being focussed: IS works in seven countries and with a small number of themes such as disability, micro-finance, sustainable agriculture, gender and health. This enables it to build up a body of understanding about these issues and to have longer-term relationships with local agencies that are acting as agents of change with specific marginalized groups.
- Having an explicit model of development (conceptual framework): it does not directly implement development projects, nor is the main impact of its DW's directly with poor people themselves. Rather, it works to strengthen the effectiveness of its local partners through organisational development, and to strengthen the ability of the civil society sectors to bring about change through its strategies of institutional development.
- Providing support which is flexible and appropriate: it invests time and effort into developing good partner relationships; it facilitates partner definition of needs and encourages their contribution to IS's country strategies.

- Being an effective size: it is small compared to VSO but this has advantages. IS is innovatory and a risk taker. This enables it to support partners who have a ‘good idea’ but limited resources or experience to translate the proposal into a sustainable development intervention.
- Supporting DW’s who are highly qualified, experienced and motivated: they are not young people looking for experience but those with experience who are able to share this with others. They are selected because they have the ability to analyse and adapt their contribution to the actual needs faced by the partner. This adaptability is an essential quality in all the countries in which IS works but especially so in situations of extreme change (e.g. Occupied Territories).
- It does what it says it will do: IS has a strategy with explicit objectives to be achieved. It has achieved these objectives and is committed to evaluation and learning in order to achieve even greater effectiveness.

5. Results 1- The PPA Objectives

5.1 One of the main tasks of the evaluation was to assess ‘progress made towards achieving the objectives set out in the PPA using the indicators and strategic activities to qualify the results’. (Appendix A: TOR para 2.1). The evaluation used all the sources of data outlined in the ‘Methodology’ to make this assessment but an important reference was IS’s own assessment of how far the four PPA objectives have been achieved (Second Report 2003 on the PPA). The findings are structured around the two key evaluation dimensions:

- did IS do what it said it would do? [internal validity]
- has it made any difference? [impact assessment]

Has International Service done what it said it would do?

5.2 Of the two questions this is the easiest to answer. This is not solely because methodologically it is easier to demonstrate if ‘actions’ were done but also because the original PPA objectives and indicators were written in terms of the ‘doing’ rather than in terms of the outcomes.

5.3 Table 1 below summarises how well IS has performed in the delivery of the four PPA objectives (which are also its strategic objectives as identified in its five year plan). These are: to facilitate sustainable development; to develop a capacity building approach; to promote global citizenship; and to enhance IS’s position as a leading British NGO providing development workers. A more detailed analysis of the performance of the strategies is shown in Appendix C (Table C1). It needs to be remembered that the evaluation was conducted during 2004 when there was still more than half a year to run on the current PPA.

Table 1. Achievement of the 4 PPA Objectives

Objective:	Rating*	Comment
1. To deliver a high quality programme to facilitate sustainable development according to local needs and priorities in all International service programmes.	2	Five strategies were used to deliver this objective. Excellent work was done to systematically involve partners in consultations and strategy development .A large investment of resources was made to improve impact assessment, and specifically in how DW's contribute to strengthening project partners. Some moderate expansion in programmes as a result of taking a thematic approach. Programme size of 100 DWs will not be reached by 2005 (ranges from 75 to 65) due to funding constraints.
2. To develop a 'Capacity Building Approach' to the eradication of poverty applying this principle within International Service as well as in our work overseas.	2	Five strategies were planned and all have been implemented. A key competence of IS is the clarity of its development approach: a capacity building approach both with partners and internally. The main weakness to the achievement of this objective has been the need to improve the M&E system which means that IS cannot as yet aggregate impact to give an overall programme impact assessment.
3. To promote the concept of Global Citizenship and improve organisational capacity to represent the concerns of our partners in Northern policy forums.	2	Four strategies have been implemented. Two new alliances established to promote specific development issues- one international and the other network local. Played a facilitating role in bringing groups together to mainstream disability in development. A major piece of work completed in Palestine which involved the submission of 4 papers to the International Development Select Committee. 'Making Connections' is being successful with a high rate of contributions from DWs and 30 UK civil society groups taking part. The IS website is being well visited. The development awareness initiative 'My Village My Life' is being taken up as a global citizenship resource.
4. International Service will seek to enhance its position as one of the leading British NGOs sending development workers through increased fund-raising and profile- raising.	1	Four strategies were involved here: through BVALG and BOND IS is influencing policy to a degree greater than its size would suggest; the 50 th Anniversary has been a peg that has enabled it to exceed the anticipated level of achievement for this objective. It has reached its non-DFID funding target of 30%. Fundraising is increasingly difficult but IS has developed a good media and fundraising strategy, and a 50% increase of names added to its data base.

[* Rating: 1= excellent (exceeded the objective); 2= good (achieved the objective); 3= satisfactory (most of the objective achieved); 4= less than satisfactory (achieved only a limited part of the objective)].

5.4 Overall IS has done what it said it would do. The first three objectives have been achieved through the successful implementation of the fourteen strategies. Objective four exceeded the intended PPA expectation in that it was able to build on the 50th Anniversary and benefit from the resources and publicity that the Anniversary provided. The evaluation shows an impressive organisational investment in M&E, and developing a system that will enable IS to strengthen its impact assessment. The organisation has fully adopted a 'capacity building approach' to all its work. The evaluator was also impressed by how this new conceptual thinking is underpinning all

the approaches and procedures (from partner selection, project analysis, DW recruitment, induction training, reporting and placement review). Greater thematic focus is enabling specialisation and therefore a potential to build up in-country experience and expertise in a specific number of subject areas (e.g. micro-finance). IS is making a valuable contribution to development education in the UK- far larger than would be expected from its size. It is a full player in networks such as BOND and BVALG and the Anniversary has provided publicity and enabled it to widen its funding sources.

5.5 The two main weaknesses relating to PPA strategy implementation is the lack of growth in DW numbers and measuring outcomes and impact. A PPA indicator was that by 2005 the programme size would reach 100. This will not be achieved. The reason is primarily due to lack of financial resources as current levels of funding are only sufficient to support around 70 placements. Secondly, is impact-assessment. IS is not alone in finding this a challenge. Being able to assess 'what difference we have made' is not solely about introducing new M&E procedures. It's about a whole way of thinking and learning. Such organisational cultural change takes time. Given the high level of commitment to the new ways of working it is highly likely that IS will be able assess impact during the next strategic planning period and be able to present aggregated results. Both these issues will be discussed later in the report.

Has IS made any difference?

5.6 The answer can be approached from many perspectives; this evaluation has taken three: What difference is the overall IS Programme making? What difference are the programmes at country/ regional level making? And what difference is IS making to public awareness of development issues?

Impact of the Programme Overall

5.7 IS's strategic priorities, the themes, and PPA objectives are all aligned with one or more of the **Millennium Development Goals**. The strategy has an explicit poverty reduction focus. The programmes are based in some of the world's poorest countries and regions, and with the marginalized groups in these areas. The 2003 UNDP Human Development Index places Mali and Burkina Faso at 172 and 173 (out of 175 countries); Bolivia is ranked at 114 (being the poorest country in Latin America); Brazil is 65 and formally rated as middle-income but it has an extremely unequal distribution of wealth and the two regions where IS works have the highest poverty in the country. The Occupied Territories is at 98 but the situation has deteriorated dramatically in recent years and estimated poverty levels are up to 55% and getting worse.

5.8 Over the period of the PPA there has been a refining of IS's thematic approach. The four main themes are health, human rights, sustainable livelihoods, and capacity building. The benefit of the focus has been the increased ability to develop expertise in these subjects; for example, in disability and micro-finance. This

organisational competence relates to both technical aspects and to methods and approaches. This has increased impact of the programme work at local and national levels through better uses of resources and simply by having better quality projects; also at the international level through the promotion of best practice and awareness-raising. An analysis of the themes is shown in Appendix C Table C3. All DWs are involved in capacity building at individual, organisational or institutional levels; most (68%) are helping to implement livelihood projects (agriculture/forestry, environment, ethnic/political, or gender issues); and 14% are in health. In all the projects the target groups are poor people- marginalized communities (90%), women (33%), youth and children (12%), and indigenous peoples (10%).

5.9 The table below shows the link between the IS programme and the MDGs.

Table 2 Millennium Development Goals and the IS Programme

MDG Goal:	IS's Work:
MDG 1: 'to eradicate poverty and hunger'	IS's sustainable livelihoods focus has resulted in an increasing proportion of placements contributing to this goal (from 40% in 2001 to 68% in 2003).
MDG 2: 'to achieve universal primary education'.	This is not a theme but a contribution is made through IS's work in the OT.
MDG 3: 'to promote gender equity and empower women.'	Though there is a relatively small number of specific Human Rights/gender projects. Women as a target group constitute 33% of the placements and many are linked to livelihood/credit support.
MDG 4: 'to reduce child mortality'. MDG 5: 'to improve maternal health'. MDG 6: 'to combat HIV/Aids, malaria and other diseases'.	Both directly in the health projects and indirectly through sustainable livelihoods work a contribution is being made to these three goals.
MDG 7: 'to ensure environmental sustainability'.	Work in Bolivia on irrigation and erosion, and an underpinning criteria for support to any IS partner intervention.
MDG 8: 'to develop a global partnership for development'.	Strategies on good governance in Latin America, human rights in the OT; and working with young people to develop skills and income earning opportunities especially in West Africa all contribute to specific aspects of this goal.

5.10 The above analysis does not demonstrate 'impact' as such, but it does make explicit the links between the IS programme and specific poverty reduction goals. It is at the country programme level that evidence of attribution can be shown between IS's work and the strengthening of partner organisations to deliver meaningful benefits to disadvantaged people. There are many examples of how project interventions have improved lives, but it needs to be remembered that because IS's underpinning approach is 'capacity building of partners' the critical indicators of impact relate to organisational and institutional development that have enabled partners to be more effective. This is not to say that individual DW's actions have not 'made a difference' to individuals and poor communities, but the real test of impact is how IS's overall strategy of capacity building has led to improvements.

Impact of IS's work at the Country and Regional Levels

5.11 The source of the analysis here has been the country evaluations conducted by external consultants and IS's own assessment of their work. Because the country strategies and goals have not, to date, been written with specific outcomes and indicators, it is not possible to make a systematic assessment of each programme. Instead, the evaluator has examined these sources and selected illustrations of where IS's work does appear to 'have made a difference'.

West Africa: Burkina Faso and Mali

5.12 Overall impact has been greatest in:

- Agriforestry- through IS's support to the local parastatal organisation who is a major influence in the sector, the use and commercialisation of indigenous trees has increased. A great number of farmers have benefited from improved seeds and techniques. This has resulted in greater production and higher income.
- Microfinance- the work in West Africa has had an impact both within individual organisations where DWs have been placed, and institutionally through IS's support for networking and sharing good practice. New methods have been developed and many poor people have benefited directly from the loans but also from the training provided in the projects.
- HIV/Aids awareness- support to three local radio stations over the past 2 to 3 years has resulted in them communicating very good information. This has included radio drama in local languages on HIV/Aids themes. The project has also enabled the programmes to be used as a focus for civic awareness initiatives.
- Young People- the work of Jeunesse et Development (J&D) has been strengthened in the areas of management, admin, funding, IT skills, networking, planning and M&E. The organisations growth and effectiveness is a direct consequence of IS's inputs and young people have greatly benefited.
- Literacy- IS has supported 'Reflect' a participative methodology for social change. The main target group are rural women and young people and the work has extended to 26 villages.

South America

5.13 In Bolivia the difference IS has made can be seen explicitly with:-

- Indigenous women- through the IS partner's work the improvement in the women's organisational skills, and the raising of their self-esteem.
- Disabled children- supported projects have provided better levels of care through therapy not usually available. This has come about in part by the presence of IS's DWs and also from the staff training they undertook with partners.
- Psychiatric patients- enhanced the quality of their lives.

- Aged- by influencing the contents of the National Plan and lobbying for its implementation.
- Improved housing- for semi-urban and rural communities
- Special education- providing training to teachers and other professionals in special needs resulting in better work practices.
- Rural communities- improvements to agricultural production and irrigation systems, and increased awareness of understanding about natural resource management.
- Coordination among NGOs- a key area of challenging work has been to support coordination between NGOs and Municipalities.
- Advocacy- many IS projects have been directed at strengthening the ability of partners to advocate for the poor on specific issues.

The examples above are a mixture of what DWs have done directly to support poor people, and what has been the outcome of their organisational development work within the host organisation.

5.14 In Brazil the key impacts can be seen in terms of:-

- Leprosy and skin diseases- in cooperation with WHO, International Service has worked for more than fifteen years with local organisations and authorities in the Amazon region to control leprosy and to build the capacity of those dealing with the disease. The main local partner is FUAM who is now a very competent agency (in effect being a parastatal hospital for tropical diseases). The disease is now under control. A large number of indigenous, and other poor people, have benefited. This is good example of how a long-term capacity building relationship with a partner has led to a significant change and one that is sustainable.
- Rights and representation of indigenous people- have improved at the local level (via IS's support to authorities and NGOs) and through advocacy at the national level. For example, IS has contributed to the passing of a national law recognising Amazon people as an indigenous group with their own rights, land and culture.
- HIV/Aids- IS has worked to improve the capacity of local organisations working with HIV/Aids victims. One focus has been sex education, particularly among the most marginalized groups such as prostitutes in the transit towns.

As with Bolivia the examples above illustrate the effect of the IS approach. Through the close relationship with partners, many of whom it has worked for many years, it is able to identify the constraints that are holding back change: this may be at the level of skills among individuals within the NGO, or related to the capacity of the whole organisation; or the relationship of partners to the local authorities; or the need to work institutionally at regional and national levels to facilitate legislation or policy implementation.

Occupied Territories

5.15 The OT is probably the most challenging of the areas in which IS works; it also has the highest profile, and the most difficult to achieve long-term development given the terrible events that occur daily. IS's focus has been on working with civil society and to select groups who pursue a progressive and inclusive agenda. The

target beneficiary groups are the most vulnerable: disabled people, women and children. Examples of where impact has been achieved are:-

- Solidarity with local partners- IS's presence and commitment gives hope and support to Palestinians who feel increasingly deserted by the world. The importance of this solidarity is consistently stressed by both partners and the local communities. At a time when many INGOs are withdrawing their international staff IS's presence makes a very real and significant difference.
- Networking- IS's work bridges the gap that exists between many NGOs working in the same sectors. This has contributed to overcoming some of the historical animosities existing between certain human rights groups and enabled them to make joint applications to major funders. It has also resulted in shared learning in such subjects as occupational art and speech therapy. This is a direct consequence of a DW taking the initiative to facilitate networking.
- Human Rights- the focus has been training of local staff, introducing new ideas adapted to the local reality (e.g. the Settler Hotline), and ensuring that submissions made to international bodies such as the UN Human Rights Commission are accurate, fluent and if necessary backed up by attendance in Geneva. The presence of DWs who are international lawyers has added to the credibility of Palestinian human rights organisations and has brought them into contact with organisations such as the US National Lawyers Guild and the International Association of Democratic Lawyers.
- Linking with IS's UK awareness work- having a programme in the OT has given IS a legitimacy and credibility to talk about the issues. For example the four papers submitted to the International Select Committee.

The programme in the Occupied Territories is a good example of the adaptability which IS can achieve. There are few placements which have restricted themselves to solely fulfilling the original placement brief. All the DWs have shown resourcefulness and flexibility in applying their skills to the needs encountered on the ground.

Impact of IS's work in development awareness and global citizenship

5.16 Development education is a long-term strategy and is about building foundations for change rather than campaigning for specific policy changes. However, IS can identify indicators as to how their work has had an effect:-

- Partnerships and alliances- the work with academic institutions (such as Leeds and Leicester Universities, and Askham Bryan College), has resulted in development materials and issues being more systematically incorporated into the courses.
- Disability Conference- has started to produce some tangible changes. For example, there is an increasingly vocal call for DFID to be more proactive on the issue of disability and development. DFID's presence at the Conference was a catalyst for this. The on-going discussions about a

UN Conference on the rights of the disabled now includes a forum for DPOs to input their views.

- ‘Making Connections’ and ‘My Village My Life’ - have had good rates of uptake from users. Assessing impact is difficult but IS can show that copies of both are being used and they get very positive feedback from users.
- OT Papers to the International Development Select Committee- has demonstrated IS’s standing. It was invited to make submissions, and knew that its views had reached some of the key people who can influence British government policy.

5.17 Development by its very nature is about change; change that is complex and takes place over time. Much of the above assessments are subjective, and rely on judgements about attribution. In the future IS will be better able to make systematic assessments of the outcomes its work has had. However, even given the current methodology there is sufficient evidence to conclude that IS’s programmes, both overseas and in the UK, are making a significant difference to the effectiveness of their partners, and consequently to the improvement of the lives of some of the worlds most disadvantaged people.

6 Results 2- Assessing IS’s Overall Performance

6.1 In the previous section the focus was on the Programme Objectives and how well they had been achieved. In this section the evaluation is broadened to assess how well IS as a whole has performed.

6.2 Six criteria will be used. These criteria are of a type that many organisational assessments use but there is an added relevance to their application here because a recently commissioned study by DFID’s Information and Civil Society Department suggested that they should be applied when considering support to UK Development Civil Society Organisations (see Mark Robinson and Julie Hearn ‘Funding of UK Development Civil Society Organisations Using PPAs’, July 2004.). The criteria are:-

1. Organisational effectiveness-overall progress to achieving the PPA objectives.
2. Policy coherence- the extent to which IS’s outcomes are aligned with DFID’s goals and the MDGs.
3. Capacity Building- whether stakeholders capacity has been strengthened.
4. Knowledge- the creation and dissemination of new ideas and information.
5. Influence-the contribution to policy debates.
6. Innovation- the development of new approaches, techniques and practice.

1. Organisational Effectiveness

6.3 As the results in Section 5 show IS has very largely achieved the 4 PPA objectives and implemented the strategies associated with each. In terms of assessing impact a constraint has been that the original objectives were not adequately expressed in terms of specific outcomes to be achieved. In the new strategic plan that is currently being developed this weakness is being addressed. However, both the evaluations conducted by external consultants, and IS's own internal learning process, provide evidence to show that significant impact has been made in three areas: through IS's organisational and institutional strengthening of partners; supporting development awareness in the UK; and on the lives of some of the world's poorest people as a consequence, directly and indirectly, of DW's placements.

6.4 The effectiveness of IS can be judged by looking at four dimensions:-

- **Relevance:** do the outcomes and key areas of impact address policies and practices that benefit the poor and contribute to learning in a particular theme or sector? The IS strategies do benefit the poor and the partners working with them and much of this relevance is a product of the systematic consultation and needs analysis that IS undertakes. The current Strategic Plan provides the overall direction but it is the country level partner consultations meetings, and the procedures followed to identify placement needs, which ensure that the programmes are both relevant and responsive.
- **Sustainability:** do IS's interventions produce lasting change in policy and practice? A long-established criterion is that DWs are not 'gap-fillers'. The underpinning development approach of IS is explicit- to strengthen the capacity of individual partners and the sector in order that they can bring about sustainable change. This approach is evident in all the country programmes.
- **Cost effectiveness:** are the financial inputs commensurate with IS's objectives and do they offer value for money? Overall, only 10% of total expenditure goes on management and fundraising (with the ratio of income raised to funding costs being a healthy 8:1). Three percent of the budget is spent on advocacy work. The vast majority of income (87%) is going to programme activities in the field. In terms of the four PPA Objectives, the first two- delivering a quality programme and the capacity building approach, which are the ones directly concerned with the MDG outcomes, get the bulk of the funds, namely 47% and 44%. The third objective, related to development awareness in the UK, receives 6%, and the fourth (IS's profile) the remaining 3%. Thus the resource allocation is certainly commensurate with the strategic objectives. In terms of cost effectiveness the analysis of DW costs conducted by IS indicates that it is comparable to sister volunteer sending agencies. Compared to at least two of these agencies IS has proportionally fewer HQ staff, and a higher proportion of funds going to the field. The evaluator was impressed that the above data was immediately available and this in itself is a good indicator that IS closely monitors costs and the use of its resources.

2. Policy Coherence

6.5 It was shown in Table 2 the contribution that IS's work is making to the Millennium Development Goals. The countries and regions that IS works in are some of the world's poorest, and the target groups the most marginalised. Not only is there a strong alignment between IS's objectives and DFID's, there is also additionality. For example, IS's development education and advocacy work has involved strategies such as the 'Common Purpose' initiative, the Corporate Forum, ICA and the Mali Development Group. These are partnerships at a very practical level and with organisations that larger NGOs are less likely to reach.

6.6 At the field level the IS themes are congruent with DFID's priorities, for example in gender, health and disability. DFID does not work in West Africa but in Brazil, Bolivia, and Palestine IS's programmes are in line with DFID's strategies. For example, in Brazil both organisations prioritise the North and North East, with a focus on social inclusion, good governance, and pro poor policies. The IS programme is also complementary with the new regional strategy DFID has identified which involves closer links with the British NGOs in the region who receive a PPA. IS has been playing a coordinating role since 2003 in organising meetings between DFID and the three other British PPA organisations (Oxfam, SCF and Action Aid), to facilitate cooperation on specific themes.

3. Capacity Building

6.7 Of the six performance criteria this has the clearest assessment result because it is IS's underpinning development approach. The approach is implemented by all DWs (see Appendix Table C3), and at all levels of intervention i.e. increasing the skills of counterparts, developing organisational competence, and strengthening the civil society sector through networking and advocating for policy change. All the external evaluations show that IS is not confining its 'capacity building' activities to training (the traditional activity); there is a range of support being given including improving systems and procedures, reporting, strategic planning and fundraising. The West Africa microfinance evaluation illustrates that these three areas of capacity building were all being undertaken: counterpart training; improvements to partner organisational policies and procedures, and assisting with fundraising. This latter activity may not have been in the DW's original brief but has become important for many placements. IS considers it to be a legitimate activity 'as long as the skills involved are also being transferred to the partner'. Institutional development was not just about encouraging networking between local NGOs but also influencing policy change within key organisations so that microfinance projects could be more effective. The most 'successful' DWs had worked within their organisation to challenge strategic thinking. For example a change of savings-to-loan ratio (which decrease the risk to the partner), and the acceptance of men into the projects (paradoxically to protect women's access to the service by avoiding situations where men use their wife's membership to access money).

6.8 Partners are the critical vehicle for how IS can contribute to the improvement in the lives of the poor. The impact on the target groups is a direct consequence of the effectiveness of the partner. But the water in which the partner swims is also critical, and hence the importance of institutional development. IS works to build the capacity

of local government and other service- providers. The work in Latin America illustrates this very well. Working with municipalities is a challenge. A workshop in 2000 analysed the contribution of DWs and showed they had contributed considerably to strengthening local authorities. In Brazil one of IS's greatest successes has come from the sustained support to a local NGO that has lead it to becoming a parastatal hospital able to be the main regional resource in treating leprosy. In the OT given the size of the public sector the relationships of support to NGOs and the Palestinian Authority are mutually reinforcing.

4. Knowledge

6.9 Both the overseas programme and the promotion of global citizenship provide extensive examples of IS creating and disseminating new ideas and new ways of working relevant to DFID, donors, governments, local NGOs and CBOs. For example in Latin America the work with Municipalities has provided a model as to how local government and local NGOs can add synergy to each others work; in West Africa the microfinance projects demonstrate IS's ability to challenge existing policy approaches. In Palestine an example is the production of a pre-school activity book for use with children in Gaza. This has been adopted by UNDP, UNWRA and Bethlehem University, and is now in its second print.

6.10 DFID is obviously an important stakeholder and over the period of the PPA there have been many joint meetings at country level for sharing information. In Brazil there are regular meetings with the Representative and advisers regarding sustainable livelihoods, health, social development and indigenous rights. In Bolivia joint DFID/IS workshops have been held to analyse strategies and identify points of mutual interest. A DFID rep attended the workshop in April 2003 on Municipal Development, and a DFID adviser was part of the September 2003 workshop on 'Analysis of the Contribution of DWs within Municipalities'.

6.11 Looking to the future: IS's new M&E system and the tools it is developing to assess organisational capacity and is likely to be of value to many other actors who work through partners and IS needs to build in a dissemination process to share their learning.

5. Influence

6.12 IS uses its field staff to take forward development issues and policies with a wide range of in-country stakeholders. Within the UK it is the strategies associated with PPA Objective Three which contributes to policy debate. IS is not a campaigning or advocacy agency as such. Rather it contributes to development awareness through the provision of resources to targeted groups. The submission of the four papers to the Parliamentary Sub-Committee and the Disability Conference are both examples where IS has influenced debate.

6.13 The 'Making Connections' Programme is reaching out to many UK groups- some of whom would not otherwise be exposed to the issues. The Corporate Forum is an example of IS talking with industrialists and chief executives, not solely to raise money from them but to encourage them to take part in activities (e.g. a visit to West Africa by their finance staff to experience the microfinance work).

6. Innovation

6.14 In Section 4 (para 4.3) one component of IS's distinctive competence was identified as being innovative. Partly as a consequence of its size it has the ability to respond quickly and flexibly to new proposals and ideas. Two illustrations: the work with Municipalities in Bolivia and the youth projects in West Africa. With decentralisation the function of Bolivian Municipalities became crucial, particularly for the poor communities in the remote rural areas. However resources are very limited both financially and in terms of understanding of development issues. Consequently IS's work with partners and beneficiaries was extended to include awareness and training in accessing support from the local authorities. This work has been innovatory because not many other agencies have attempted to work in this way. It was also a new approach in that it involved 'double placements', that is DWs working for both an NGO and the Municipality. It has not been easy or risk free, and it has been controversial in the eyes of some funders who think that aid to government institutions should be left to bilateral agencies. But it has proved to be very valuable and contributed to community development.

6.15 The second example is from Mali. Jeunesse et Development J&D) has been a partner for 4 years. They are a very young organisation and initially with limited management competence. Through the work of their DW placements the partner has grown in capacity. An innovative idea of the DW has been the creation of a Mali Development Group based in the UK who will help fund some of J&D's work but also raise development issues relating to the country. The DW was instrumental in working with Oxfam's local programme to hold a joint meeting to address the issues of young people across the region. This led to the 'Bamako Declaration' and the subsequent micro-projects run by the partner in Mali, Burkina Faso and Togo. The project has placed young people 'on the development map' and given them a voice to influence project decisions in a way that had not happened before. This methodology is innovative; young people participate in the design of the project and selection of beneficiaries, and have a level of responsibility not found elsewhere in the region.

6.16 Finally, it should be said that IS's approach is innovatory at both the micro and macro levels. At the macro in the sense that the selection of a capacity building approach was innovatory at the time it took this decision. At the micro because it is responding to the needs of partners by putting together 'packages' of skills that few other agencies can provide; for example, a speech therapist who speaks Arabic, a sign language teacher who speaks Portuguese, a Human Rights lawyer who can network etc. It is also innovative in its choice of target groups frequently identifying marginalised people that others have not seen or ignored.

Overall

6.17 The use of the six performance criteria has provided a structure enabling an overall assessment of IS's efficiency and effectiveness to be made. It is performing well on all six. In terms of organisational effectiveness it has largely achieved the 4 PPA objectives and delivered on most of the planned strategies. It resources its placements in a cost effective way. The impact needs to be measured more systematically but this is being done. The overall organisational direction and

achievements are poverty focussed and are contributing to the MDGs. The evaluator has been impressed by IS's own internal development. It has taken very seriously the underpinning development philosophy it identified in the current Strategic Plan and is committed to refining its learning. Given its size it is making a contribution to knowledge, influencing, and innovation.

7. Issues Arising

7.1 This section examines four issues that have emerged from the evaluation findings, and require, where appropriate, changes during the life of the next PPA. The two most important issues will be discussed first.

Monitoring, Evaluation and Learning

7.2 IS recognises that a weakness in the delivery of the current PPA is the ability to measure, in a systematic way, outcomes and impact. The problem is not simply a lack of tools or a failure to express the initial PPA Objectives as measurable outcomes. As with all the development agencies that the evaluator has worked with the root cause is one of conceptual- thinking. The mission of development agencies is to do 'good' and therefore there is a predisposition to think that all its actions are benefiting the poor by one means or another. But in order to measure impact in any useful way the organisation needs to accept that some strategies are more effective at achieving 'good' than others. To identify outcomes requires IS to make explicit its conceptual thinking and make explicit the plausibility between its strategies and the impact on partners and the poor: in what ways does it think partners lack capacity? How can IS strengthen these areas? What is the expected consequence to partner effectiveness and the targeted beneficiaries? IS deserves praise for the progress it has made over the last 3 to 4 years in developing its capacity building approach. It is IS's organisational reflection and learning that is the real necessary condition to be in place to measure impact. It is not solely about the development of tools and reports but how the M&E system helps IS to regularly refine its conceptual thinking. It is this thinking and learning which should be the basis of defining outcomes and indicators in the next Strategic Plan.

7.3 Over the period of this PPA IS has invested significantly in designing and implementing the new M&E tools and procedures. The system is comprehensive in that it will enable assessments to take place at all levels: the strategic; the country programme level; learning level; and the work in the UK. The challenge of aggregation will be achieved in a number of ways: by the appointment of a fulltime person to facilitate monitoring, evaluation and learning; the support to country teams to identify learning and distil the important points into their country reports; and at the senior management level through the discussion at the annual staff meeting of the learning during the year and recording this in the annual report.

7.4 In the last two years IS has been developing its Programme Monitoring Tool (PMT). This enables an assessment of individual placements against certain attributes and achievements, and to rank partners and DWs within country in terms of 'success'. This ranking is being done twice yearly. It involves the Regional Programme Manager working with the Country Director to use the tool to assess both the DW's and partner's effectiveness, and to identify reasons for the differences. The criteria have been derived 'organically' from the experience of the country programme (that is not borrowed from elsewhere). The challenge has been to move staff thinking from 'a good placement is where the DW stayed and the Director was a nice person' to a good placement is where 'the DW enabled the partner to significantly strengthen their ability to help poor people'. IS is now developing the tool so that it can further improve the success criteria.

7.5 The development of the PMT needs to be a priority in the next PPA period. The aim should not only be to enable country teams to monitor and evaluate their work, but also at an organisational level to inform all procedures and challenge conceptual thinking: what makes a partner an effective catalyst for change? If IS can do this it will have an analytical tool that will be valuable to all development agencies that work with and through partners. Specific ways should be identified in the next Strategic Plan for sharing the findings with sister organisations.

Growth of the Programme

7.6 IS has not been able to reach the target of 100 development workers. There is nothing particularly significant about this number, but it is an indicator of a serious constraint- funding. The main reason for being unable to recruit the 'missing twenty-five' has been almost entirely lack of money. The results in Section 6 showed that current resources are being used in a cost-effective way. There is organisational capacity, demand from partners and on-going needs of beneficiaries to justify growth. It seems likely that DFID will wish to look at its current support to the agencies receiving PPAs and to prioritise those that have most completely fulfilled their PPA objectives, and those whose strategies most closely align with DFID's objectives. This evaluation has shown that IS has performed well and its achievements merit DFID's increased support in the next PPA round.

7.7 It is the evaluator's hope that as a result of any re-balancing process DFID will give serious consideration to increasing funding to IS by more than the rate of inflation. Compared to some of its sister agencies in BVALG, even those of a comparable size, IS currently receives a smaller allocation of the available PPA funds. Only DFID will have access to all the current evaluations of the PPAs, but it seems likely that given the achievements discussed in this Report, IS will have performed well when compared to the other PPA holders. Given its distinctive competence (see para 4.3) and the close alignment of its strategy with DFID's, it is recommended that DFID give increased funding above the rate of inflation and to a level comparable with the other successful agencies.

Programme Development

7.8 The issue here is not growth per se but how the programme should develop. One of the strengths of IS is that it is focussed; it has not fallen into the trap of doing a little in a lot of places. It has confined its offices to five countries, and this enables it to build up country knowledge and develop relationship with partners and other key players. In recent years it has focussed on a number of themes in order to strengthen its expertise in these subjects. But as the programme evaluations show (e.g. microfinance in West Africa) it needs this specialisation of competence to be developed even more deeply. The evaluator questions whether, given the level of resources, it is possible for staff to develop sufficient expertise, and to support DWs to gain the skills, in the current number of subjects. It may be necessary to prioritise even further within each country in order to develop a sufficient level of technical capacity.

7.9 A related issue is how IS takes forward its capacity building approach. It was argued above (para 7.5) that over the next few years the PMT could be the means by which IS builds up a body of understanding about partner effectiveness. This will enable all the organisational processes to be refined by hard evidence as to what interventions are the most effective. In particular this will improve the procedures for DW recruitment, selection and induction, and partner selection and on-going support. But already one direction has emerged from the evaluation, and that is the need for IS's capacity building to include both organisational development and institutional development. Organisational development is the strategy by which the DW supports the partner to overcome constraints to effectiveness; institutional development is how the DW and IS staff increase the capacity of the civil society sector to implement change. Currently the latter includes encouraging networking and sharing information, and influencing at local and national levels for policy change. To take institutional development further will need the country teams to have the skills and time to support these actions. Again it is unlikely that this can adequately happen without a greater focus on fewer themes.

Continuing to be Innovative

7.10 IS's core activity is the provision of very able development workers who match a felt need among a partner, and so it is in this area where creativity and risk taking is most needed. The new Programme Monitoring Tool will enable the identification of the factors associated with 'successful' DWs, and so this information can be used to guide new ways of recruitment, induction and training. IS is already recruiting people from many different countries (recruitment from within region such as West Africa and in microfinance has shown to be very effective), and using different mediums (the website for example). These approaches can be developed further by experimenting with different lengths of contract, and short release from employers in the UK.

7.11 The success of the development awareness and global citizenship strategies show that there are many groups and individuals who can be engaged if the right approach is taken. DWs themselves are a powerful entry point to new groups and initiatives such as the Mali Group show how one enthusiastic person can motivate

audiences that otherwise may not be reached .To be innovative in this way requires resources and continued support for PPA Objective Three. This is cost effective because IS can reach many sectors that are not targeted by other agencies. However, there is a responsibility for IS and the other agencies engaged in development education to give full support to networks such as BVALG and BOND in order to co-ordinate and co-operate their work to avoid replication and achieve added-value.

8. Conclusion

8.1 The Terms of Reference for this evaluation had four components; it is these which have been addressed during the report and can now be summarised:-

8.2 Progress made towards the objectives set out in the PPA.

- Overall IS has implemented what it said it would do. The first three PPA Objectives have been achieved, and Objective 4 exceeded the initial PPA expectation.
- The organisation has fully adopted a ‘capacity building approach’ to all its programme work.
- The two main weaknesses relating to implementation are the lack of growth in development workers and measuring outcomes and impact.

8.3 Added-value

- IS’s strategic priorities, themes, and PPA Objectives, are all aligned with one or more of the MDGs . The programmes are based in some of the world’s poorest countries and regions.
- The work is making a difference to poverty elimination and this can be illustrated extensively from the achievements in all five country- programmes and in the global citizenship programme.
- There is a distinctive IS approach to poverty reduction: working through organisational and institutional development interventions with partner and civil society agencies.
- Its development workers are highly qualified and experienced. They are selected because their skills and competencies match the specific needs that have been identified.
- A set of criteria were used to assess organisational performance and IS was assessed as performing well on all six.
- The original PPA Programme has been followed with no major changes being made.
- IS has worked closely with DFID in Brazil, Bolivia and Palestine and facilitated co-operation and knowledge sharing among other PPA holders. It has benefited in the UK from DFID staff inputs into PPA planning and reporting.
- Analysis of the PPA funding shows that it has been used in a cost-effective way. The majority of income (87%) has gone to programme activities in the field. PPA Objectives One and Two receive the bulk of the funding, namely 41% and 44%.

8.4 Monitoring and Evaluation

- Over the PPA period IS has invested significantly in designing and implementing a new M&E system. This is comprehensive and will enable assessments to take place at all levels of organisational performance.
- The evaluator is confident that in the next PPA period outcomes, indicators and impact will be measured in a systematic and effective way.
- IS shows commitment to organisational learning and improvement.

8.5 Future relationship

- IS has the organisational capacity in terms of staff competence, systems and motivation to grow. The demands from partners, and the on-going needs of beneficiaries, justifies growth.
- The target of 100 development workers was not reached and this was almost entirely due to a lack of funding to support an increase.
- IS has performed well during the PPA but receives a smaller grant allocation than some of its sister volunteer sending organisations of a comparable size.
- It is recommended that for the next PPA, DFID give increased funding above the rate of inflation and to a level comparable with other successful volunteer-sending agencies.

9. Recommendations

To DFID:-

1) That given IS's achievements and performance with the current Programme Partnership Agreement DFID should continue to support a PPA for a further period and at a level equivalent or above that of the comparable volunteer sending agencies.

To International Service:-

- 1) That in the next Strategic Plan, and in annual work plans, the intended outcomes and longer-term development impacts should be made explicit.
- 2) That the current commitment to developing a monitoring and evaluation system continues and that a priority be given to new ways that opportunities for learning can be introduced to improve organisational effectiveness. As part of the learning process IS's development thinking needs to be recorded and shared more widely with appropriate stakeholders.
- 3) That a clearer distinction be made in the capacity building strategies between 'organisational development' and 'institutional development'. IS's ability to support institutional development (such as networking, shared learning between partners, influencing policy change and facilitating thematic workshops) needs to be further strengthened.
- 4) That the programmatic approach is further developed by focussing even more on specific themes and areas of intervention.
- 5) That IS continues to be innovative in both how it works with partners in meeting their needs, and with development workers in terms of new approaches to recruitment, contracts and multi-partnerships.
- 6) That given the complex nature of the skills needed by development workers to support capacity building with partner organisations, induction and on-going training needs to be directly linked to specific themes and the organisational and institutional development competencies required by the placement.
- 7) That development awareness strategies be consolidated by strengthening existing alliances and further developing IS's organisational expertise on key issues such as disability, and continue its constituency building by formalising its relationships with organisations such as Common Purpose and ICA by working towards mutually agreed goals.

APPENDICES

APPENDIX A: The Evaluation's Terms of Reference

Evaluation of the Partnership Programme Agreement (PPA) between DFID and International Service Terms of Reference

Background

- 1.1 Description of organisation and objectives/vision
- 1.2 The partnership is between DFID and IS.
- 1.3 The PPA is intended to stimulate more effective collaboration, whilst recognising the independence of each partner to pursue their own policies and priorities and to concentrate on their core competencies. The PPA also aims to provide a framework for the open sharing of views and for constructive dialogue on development issues of mutual interest.

OBJECTIVE

2 The objective of the evaluation is to examine and define the impact of the PPA relationship on IS and on its relationship with DFID. The review will also make recommendations for the development of the relationship in the longer term beyond the life of the current PPA.

The evaluation will therefore examine:

- 2.1 **Progress made towards achieving the objectives set out in the PPA** using the indicators and strategic activities to qualify the results.
- 2.3 **Added value** – what changes has the existence of the PPA made to both IS and to DFID in terms of programme and strategic development. This would include
- Understanding and focus on the links between poverty elimination and volunteering
 - Changes to programme and policies during life of PPA
 - Changes to how IS and DFID work together both in the UK and overseas.
 - How effectively PPA strategic funding is used and the degree to which programmes are aligned to PPA objectives
- 2.2 **Monitoring and Evaluation** - how is IS monitoring and assessing the impact of programmes in terms of contribution to IS's strategic objectives and the PPA objectives.
- 2.3 **Future relationships** – How should IS and DFID work together in future?

3.METHODOLOGY

There will be two stages to the evaluation.

3.1 An internal assessment - in which IS and key DFID personnel, gather evidence of progress within the Specific Objective areas. The external consultant should agree the format of this work in advance. The internal assessment will build upon both quantitative and qualitative information to develop a strong basis of key lessons that can help/guide the external evaluation process.

3.2 An external evaluator will review the evidence provided by the internal assessment and cross-check it with their own investigations.

3.3 Data sources

The work will involve

- reviewing HQ and partner documentation
- interviews with staff in the UK {and overseas offices} and selected third parties

3.4 Evaluation Outputs - hard and electronic produced by the internal assessment team.

The external evaluator will produce a report, preferably of less than 30 pages and with a clear executive summary and separate list of actionable recommendations.

The report will cover the main objective and four specific areas set out in para' 2. There will be separate recommendations on the final year of the PPA and on the development of the relationship after the end of the current PPA.

3.6 Timetable

- February 2004 – TOR agreed
- March 2004 - Internal contacts identified and preliminary contact made. Evaluation Team contracted
- May-June 2004 - Internal Self Assessment (during this period – not all of it)
- July 2004 - External Evaluation
- August 2004 - Draft Report and feedback
- August 2004 - Report finished
- Sept 2004 - Negotiations for the new PPA begin.

APPENDIX B : Methodology of the External Evaluator

The evaluation was conducted during April to August 2004. It involved reading all the relevant documents; interviews with IS staff; identification of issues and assumptions; production of a draft report; and discussions with IS before the final version was produced.

The approach taken was not that of a 'school- inspection' which IS had to pass. The process was undertaken in a very open and transparent way that involved sharing with the evaluator the things that had gone well, and those less successful. Thus the ownership of the findings by IS is high, and they perceive the process as part of their organisational learning.

Specifically the data collection included:-

- interviews with HQ staff; identifying issues; questions submitted on paper by evaluator to specific managers; and discussing their responses.

- reading all relevant documents:

- Strategic Plan 2000-2005
- Annual Country Reports for 2003.
- External Evaluations-Microfinance in West Africa
 - Microprojects for Young People 2003
 - Income generation in West Africa 2003
 - IS's work on Human Rights 2003
 - Investers in People Assessment report
- 6 Workshop Reports
- Development awareness Policy and Plans 2004.
- Publicity and Media –Marketing Plan 2004
 - Media Strategy 2004
 - Vista Newsletters
 - InSide Information Sheets
 - Submissions to Parliamentary Committee
- 16 M&E documents on the process and tools
- 9 training and learning reports
- Staff and other organisational documents
- 8 Organisational notes and reporting documents
- Analysis of 'numbers' - DWs profiles
 - recruitment percentages

A draft report was produced by 8th August which was discussed with staff of IS and then a final Report was submitted on the 31st August.

APPENDIX C

Table C1 Assessment of the IS Strategies to achieve the PPA Objectives

PPA Objective and strategies	Rating*	Assessment of the strategies
1. To deliver a high quality programme to facilitate sustainable development according to local needs and priorities in all International Service programmes.	2	
+Strategy: involve partner organisations in the development of country strategy papers.	2	Country programme work is reflecting the views of partners. Though strategy papers were not revised during 2003 partners have been involved in workshops in Bolivia, BF, and Mali, and contributed to evaluations in Palestine and West Africa.
+Strategy: Consolidate and expand programmes in response to partner demands.	3	Not achieved 100 DWs target due to lack of funding. But did develop a thematic approach; increased no. of partners, and established a new geographical focus in NE Brazil. Also new work in Togo and Chile.
+Strategy :Identify skill gaps and provide suitably skilled development workers.	2	Excellent quality of DWs in terms of experience, qualifications and commitment(see Appendix C Table C2). Improved project appraisal systems and procedures are now in place. Assessments by partners of their placements is high. Website proving to be an efficient means to recruit DWs internationally. 54% of advertised posts filled within 2 to 6 months,31% in 7 to 9 months and only 15% more than 10 months.
+Strategy: Hold regular consultations with partners to strengthen partnerships and shared learning.	1	Impressive process has been followed both with employers and also other in-country agencies, international NGOs, DFID/EU and UN bodies. Networking is excellent and IS facilitates institutional development across local NGOs e.g. microfinance in WA.
+Strategy: Improve impact assessment techniques on the part of both International Service and project partners. Country strategies reflect views of partners.	2	Five country evaluations have been conducted. A dedicated member of staff has been appointed to work with external consultants to develop IS's own capacity on M&E. Worked with PARC to implement M&E systems at all levels of the organisation.

<p>2. To develop a ‘Capacity Building Approach’ to the eradication of poverty applying this principle within International service as well as in our work overseas’</p> <p>Strategy: Establish meaningful partnerships based on mutual accountability and inter-dependence.</p> <p>Strategy: All staff are encouraged to improve their skills and knowledge and value learning.</p> <p>Strategy: Improve reporting formats to demonstrate sustainable impact.</p> <p>Strategy: Widen the base of Company membership to improve accountability of the Board.</p> <p>Strategy: Improve training and orientation of development workers in capacity building and skills exchange.</p>	<p>2</p> <p>1</p> <p>1</p> <p>2</p> <p>2</p> <p>2</p>	<p>This has been very well implemented in all 5 countries, and the new tools that have been introduced to help analyse partner needs are starting to show benefits. Partners have been supported in fundraising and this is growing in importance. Many partners are contributing to DW placement costs. Even in the difficult situation in Palestine IS has been able to maintain good partner relationships.</p> <p>Investors in People Awarded. This has provided external validation for the achievement of this strategy. There is a strong organisational commitment to staff development both in the UK and overseas teams.</p> <p>A large commitment of time and money has gone into improving M&E systems and the benefits are starting to show . During the next PPA , IS will be able to provide aggregated impact assessments.</p> <p>The 14 trustees have a broad base of experience in the IS work areas. Membership includes a MP, academics, development professionals and consultants.</p> <p>There is systematic orientation and training to prepare new placements. With-in country training IS also being done. There is recognition that IS needs to do even more to share learning within region and country. A disability integration project covering both Mali and BF is one example of how this is being implemented.</p>
<p>3. To promote the concept of global citizenship and improve organisational capacity to represent the concerns of our partners in Northern policy forums.</p> <p>Strategy: Develop new partnerships/alliances with sectors of the UK civil society.</p> <p>Strategy: Initiate relevant campaigns on development issues in coordination with our overseas partners.</p>	<p>2</p> <p>2</p> <p>2</p>	<p>Two new alliances created – links with the International Cooperation Alliance (based in Oslo) and with regional reps in South America and West Africa. Working with this alliance on common issues such as women’s participation and labour rights. Also developed new links with UK-based groups.</p> <p>The ‘Mainstreaming disability in development’ Conference was a major piece of work in 2003. It involved working with other disability and development groups, and brought some key overseas partners to the UK so that they could attend. Another</p>

<p>Strategy: Launch 'Making Connections' designed to link professional groups, academics and other civil society organisations in the UK and beyond, to our work in the field</p> <p>Strategy: Enhance the scope of our website to publicise campaigns, publish research and create links to other NGOs.</p> <p>Strategy: Other development awareness initiatives implemented.</p>	<p>3</p> <p>1</p> <p>2</p>	<p>important activity was the submission to the Select Committee, and work with the British Embassy in Tel Aviv in raising the issues of the killing of two nurses in Gaza. Resulted in the issues being discussed at a high diplomatic level.</p> <p>30 groups set up and 50% of new DWs contributing.</p> <p>Average of 15000 hits per month and bulk of recruitment now done via this medium. Also in French and Portuguese so that can be of use in Brazil and West Africa.</p> <p>Global resource materials being taken up well.</p>
<p>4. International Service will seek to enhance its position as one of the leading British NGOs sending development workers through increased fund-raising and profile raising.</p> <p>Strategy: Play active role within BOND, BVALG, and other relevant national /international NGO networks.</p> <p>Strategy: Implement fund-raising strategy and diversify sources of funding.</p> <p>Strategy: Through increased campaigning and activities, enhance the profile of International Service.</p> <p>Strategy: Produce media strategy aiming to get news about our work to a wider audience.</p>	<p>1</p> <p>2</p> <p>1</p> <p>1</p> <p>2</p>	<p>IS is part of 8 major international networks and numerous professional and educational institutions. In BOND and BVALG its very active participation has fostered a mutual trust. With BOND it has contributed to establishing a clear strategy towards DFID and the EU re anti- poverty focus.</p> <p>Using the Anniversary as a hook a revitalised fund raising strategy is being implemented. The target of 30:70 non- DFID funding to DFID funding is being reached and diverse sources developed.</p> <p>50th Anniversary greatly increased public awareness and provided a lot of media coverage. The Disability Conference and Human Rights Awards gave publicity and new contacts for the data- base.</p> <p>New staff post appointed to take this forward. Branding being improved and regular press releases made. A media and marketing strategy paper has been produced.</p>

[* Rating: 1= excellent (strategy exceeded expectations); 2= good (strategy fully implemented); 3= satisfactory (strategy mostly implemented); 4=less than satisfactory (strategy only partially implemented)].

Table C2 Summary Profile of IS's Development Workers

Background of development workers:	As a % of DWs in 2004.
Holding a postgraduate qualification	77%
With development experience of more than one year	67%
Good level of language skill other than mother tongue	82%
Males	41%
Females	59%
Where placed in 2003	N=73
Bolivia	16
Brazil	13
Burkina Faso	21
Mali	14
Palestine	9

Table C3 Analysis of Themes in 2003/2004.

	As a % of DW placements involving this theme:
Livelihoods: Agriculture/forestry Environment Community development Credit/income generation	58%
Health: HIV/Aids Other	25%
Capacity Building: At individual staff level At organisational level At institutional level	100%
Human Rights: Disability Ethnic/political Gender	21%

