



Measuring the impact of livelihoods initiatives in the conservation context



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Proceedings of a multi-sectoral workshop
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Summary & Conclusions

The social context of biodiversity conservation is an increasingly important facet of conservation policy and practice, with ever greater emphasis placed on the role of biodiversity, and the responsibility of conservation organisations, in alleviating poverty. Yet the debate over the linkages between conservation and poverty reduction is hampered by a lack of empirical evidence. Many conservation organizations are engaging with livelihoods and human needs at a local level in an attempt to provide social benefits (and offset social costs) as a means to improve conservation outcomes. However, these organizations often struggle to demonstrate the impact of their interventions and of biodiversity conservation in general on people because of inadequate monitoring and evaluation (M&E), a lack of capacity to undertake social/livelihoods monitoring, and/or a lack of appreciation of the range of applicable tools and processes. M&E also suffers from being under resourced.

Three international conservation organisations (Fauna & Flora International, Birdlife International and the African Wildlife Foundation), coming together at the UK-based Poverty and Conservation Working Group, decided to organise a workshop to explore the challenges and solutions to monitoring and evaluating socio-economic/livelihoods impacts. With generous financial support from Swedbio, a two day workshop was held on 18-19 July 2007 in Cambridge, UK, at which representatives from a range of conservation and development organisations and academia gathered to share experiences of the application of socio-economic/livelihoods M&E. Focused around a series of presentations and discussion sessions, the goal of the workshop was to identify pragmatic recommendations and guidelines for conservation practitioners, that balance technical rigour with field realities.

Some 40 delegates spanning 20 nationalities participated in the workshop (*see Annex 4*). These included conservation field practitioners from 14 countries in Africa, Asia and Latin America, as well as those working in organisational headquarters on organisation-wide processes for M&E, reporting and lesson-learning. The involvement of selected representatives from the development sector, which has a longer history and experience of using and developing socio-economic/livelihoods M&E tools and processes, provided a valuable counterpoint to the discussion. The first day focused on comparing field level M&E tools and frameworks, whilst the second day focused on organisational process for M&E and reporting, and the challenges of reconciling field level, organisational and donor information requirements in a unified M&E system. Both days included presentations from conservation and development practitioners, and breakout discussion groups to explore key issues.

The most important elements for improved M&E were considered to be the following:

- Having good planning systems, conceptual frameworks etc, which incorporate M&E at the outset.
- Using different types of complimentary monitoring tool.
- Having appropriate skills and expertise, either in-house or bought in.
- Building an institutional culture of learning, and maximising feedback between the field level and headquarters.
- Creating opportunities to learn from other organisations dealing with the same issues, including development organisations.

It was also noted that one of the most valuable next steps would be to organise national/regional workshops in The South that build on this workshop, explore specific tools in more detail and help to develop local networks of conservation and development organisations that can learn from each other and collaborate.

Conclusions from the workshop are divided into six sections: (1) conclusions regarding conservation organisations; (2) conclusions regarding development organisations; (3) conclusions regarding the development of organisations processes; (4) recommendations for field practitioners; (5) recommendations for organisation-wide processes; and (6) recommendations for next steps following this workshop.

What are Conservation Organisations doing?

- Conservation organisations are relatively new to livelihoods and socio-economic impact monitoring and evaluation.
- The approach used by many is characterised by quantitative indicators, often based primarily on economic (rather than social) measures, and often using sample household surveys to generate aggregate data about a population or community.
- They also use donor-driven frameworks for considering outcomes and impacts, and M&E is often seen as a means to facilitate donor reporting and meet donor expectations, rather than for project management or organisational learning.
- Trained local enumerators and local participation in data gathering for M&E is relatively widespread.
- Quantitative, indicator-based approaches that use survey methodologies have a range of limitations and challenges:
 - As rigorous 'scientific' methods they are technically difficult to do.
 - Unless baseline data are available (which is often not the case) it is difficult to measure change.
 - They only measure relationships that have already been anticipated / included in the conceptual model, but do not catch 'the unexpected'.
 - They generally do not address causal linkages between variables, since there are rarely any 'control' sites or subjects.
 - They do not enable the target group to provide their own rationale and explanation for changes.
 - Surveys often produce a lot of data that are never used.
- Traditional household livelihoods surveys are not always sufficient, and more participatory and group-focused methods, although often more time consuming, are very valuable. However, staff with a biophysical sciences background might require specific training in using such social sciences methods.
- Qualitative approaches are rarely used – most people were unfamiliar with non-indicator-based methods such as Most Significant Change that focus on stories of change instead of measuring pre-determined indicators. This offers an additional range of benefits but also brings with it challenges, particularly understanding how to analyse, interpret and use the data, and the time and resources needed to develop a system and train people to use it. There were also concerns regarding the validity of subjective data.
- There was a general feeling that monitoring should be primarily for the purpose of project learning and adaptive management, and for communicating with local stakeholders and communities, but in reality the demand for monitoring is externally driven by donors or NGO headquarters staff.

What are Development Organisations doing?

- In general, development organisations are more progressive than conservation NGOs and incorporate a wider spectrum of approaches, from pure indicator-based/log frame approaches to much more qualitative, subjective and contextual methods.
- Some organisations appear to be driven less by donor/project reporting requirements and more by a desire for organisational learning.
- They tend to be more process-oriented, focusing on the principles behind the organisation and its approach to M&E (as an integral part of project management) rather than defining the 'how to' of M&E.
- Some of the methods used appear more evaluative, and embrace varied perceptions of change rather than absolute measures.
- However, development organisations also struggle with many of the same challenges as conservation NGOs, in terms of mainstreaming M&E organisationally and doing it well. They also deal with similar issues in the field, and so there should be potential for greater partnerships, collaboration and mutual learning
- Common issues / difficulties include:

- Causality and attribution: How to determine the causal link between different events / observations. How to know how much of an event / observation / impact can be attributed to a particular action / intervention, considering the multi-causal linkages between the external environment (global / national events and processes), project interventions and impact.
- Capacity: How to ensure there are sufficiently skilled individuals with adequate time and resources at hand to undertake M&E.
- Organisational learning: How to feed learning from the project / programme level up to the organisation to support organisational learning and sharing.
- Disaggregation: How to effectively differentiate impact on different gender, age and wealth categories (or other socio-economic categories).

From project impacts to organisational frameworks

- Organisations need to be able to say something about what they are achieving, which requires some effort to scale up from individual project-level M&E and synthesise information from an entire portfolio.
- Some organisations are attempting to develop common tools, processes, indicators or methods for common use in all projects. This brings with it certain challenges, not least the problem of defining comparative 'global' indicators that are relevant in every local context.
- Other organisations are attempting to synthesise from diverse, locally-defined indicators and approaches to M&E. This also brings challenges of scaling up and non-comparability between projects, but may be a more appropriate approach.
- A combination of these two might be best – gathering information about common indicators (common to an organisation / programme) and some that are location-specific.
- There is a benefit in having a flexible, easy to use 'tracking tool' or reporting framework (whether from a donor like Big Lottery, or from a NGO headquarters) that helps project managers think through their impacts and why (or why not) they are achieving them. This must respect the local context and recognise the value of different types of information.
- Although there is often an organisational need for simple and comparative tracking/reporting across all projects, an alternative is more in-depth reviews of fewer, selected projects (referred to at the meeting as 'cherry-picking'). There are pros and cons to each approach, and they are likely to respond to different needs (e.g. accounting to donors/public/trustees vs. institutional learning).

Recommendations for projects and project management

- Make efforts to understand the local livelihoods/conservation linkages at the outset. Good programme planning and analysis prior to implementation is critical. Many projects do not appear to have a clear understanding from the start what the anticipated linkages are, and therefore do not know when to judge a project or intervention to have been successful.
- Establish a conceptual framework based on a threat analysis that can be used to shape a project and identify relevant indicators/measures of change. M&E must be planned at the outset, not added on half way through or at the end. It needs to be adequately resourced, in particular in relation to staff time requirements.
- Define indicators locally that are locally relevant. Participatory approaches to planning and implementing M&E are best to achieve this.
- Learn from challenges as well as from successes, and ensure methods are able to capture challenges and failures.
- Analysis is vital. It is only worth undertaking monitoring if the data are going to be used.
- Less is more: concentrate on collecting a few good bits of information regularly rather than lots of information infrequently. This way it will be more likely that the exercise is cost-effective and that the data are useful, and used.
- Use different methods that complement each other and lead to learning:
 - Qualitative vs. quantitative.
 - Aggregate measures versus individual experiences.
 - Subjective vs. Objective; recording perceptions is as important as measuring indicators.
 - Methods to measure unexpected as well as expected change.

- Means to identify/understand the causes of change.
- Scale the M&E effort to the size and scope of the projects. Smaller projects cannot be expected to do the same as larger ones and should not need to.
- Be participatory (with partners, development agencies, local stakeholders and beneficiaries), but recognise the potential barriers and limitations to this.
- Encourage and solicit participation wherever possible but be practical about the challenges and cost-effectiveness.
- Ensure that M&E costs (and time) are built in to project operational plans and budgets.

Recommendations for organisations and organisational learning

- There is a need to build an organisational culture around the importance of M&E and learning and to foster understanding so that everyone buys in to the concept and the process and the value as well as the obligations that it brings. This culture must encourage reflection and acknowledge that failure, as well as success, is a part of learning. In order for individual projects to embrace a learning culture, headquarters needs to lead the way.
- Providing feedback to the field level on the results of the reporting process, and eliciting feedback from the field level on the process, can help improve buy-in and create this learning culture.
- There is a need for appropriate expertise for monitoring and evaluating socio-economic/livelihoods impacts, whether bought in (through consultants) or built in (through training and appropriate recruitment).
- A flexible tracking tool (with appropriate guidance and training) that allows projects to determine their own locally relevant M&E in ways that can contribute to institutional learning and scaling up, is better than a rigid methodological framework with predefined indicators.
- In-depth evaluations of specially selected projects over longer time intervals are useful. In this context, finding opportunities to revisit older, closed projects to assess longer-term, sustained change, may be particularly valuable.
- Using synthesised project M&E data for organisational strategic planning will help in monitoring progress towards the goals of the organisation as a whole, and for re-planning and adaptive management.
- Working in partnership with the development sector on these issues needs more attention.

Next Steps

The group identified two principal ways to move forward beyond this workshop:

- Make the information discussed at this workshop available both to participants and a wider audience. This could be done by feeding in to existing learning processes and groups, which could also be used to share ideas, tools, experiences and lessons:
 - The Poverty and Conservation Learning Group (PCLG) - <http://www.povertyandconservation.info/> - an initiative coordinated by the International Institute for Environment and Development (IIED). The goal of the Learning Group is to facilitate learning on conservation-poverty linkages between practitioners in the North and South. The PCLG has a space for downloading of the workshop outputs; a tools and methodologies section and an on-line discussion facility.
 - REMAPP - <http://groups.yahoo.com/group/REMAPP/> - a UK-based network of professionals concerned with planning, appraisal, monitoring, evaluation, research and policy issues in aid agencies. REMAPP is coordinated with very little administrative burden through a web-based 'group' and meets on an ad-hoc basis.
- Repeat this workshop at the regional level, building on the results from this meeting and exploring relevant tools and frameworks in more details. Such regional meetings could be used to promote M&E champions in-region and to facilitate more inter-organisational communication, particularly between conservation and development organisations working in the same areas. Outputs from this and any regional meetings could be used to develop a tool-kit for practitioners.

Introduction

The debate over the linkages between conservation and poverty reduction is hampered by a lack of empirical evidence. Many conservation organizations are engaging with livelihoods and human needs at a local level in an attempt to provide social benefits (and offset social costs) as a means to improve conservation outcomes. However, these organizations often struggle to demonstrate the impact of their interventions on people because of inadequate M&E, a lack of capacity to undertake social/livelihoods monitoring, and/or a lack of appreciation of the range of applicable tools and processes. The same challenges constrain efforts to analyze the direct linkages between biodiversity conservation and poverty reduction.

Birdlife International, Fauna & Flora International and African Wildlife Foundation have all received institutional funding from the Netherlands Ministry of Foreign Affairs (DGIS) to support livelihoods-focused programmes, improved knowledge management and institutional strengthening. All three organisations have been testing different livelihoods M&E approaches in selected field projects – from strict indicator-based methods to story-based techniques – each with benefits and challenges. It was felt that the development sector, with longer experience in monitoring and evaluating the impact of interventions on livelihoods could help us overcome these challenges.

In 2006, Birdlife and FFI, together with the University of Cambridge, commissioned a desk review of the social and livelihoods M&E methodologies used by six international development NGOs to identified issues, key features, lessons learnt and best practice (see *Annex 3*). This study indicated that there is a lot to be learnt from this sector, and it was also felt that conservation organisations could learn a lot from each other. So, the three organisations, with generous funding from SwedBio (a joint initiative by the Swedish International Development Cooperation Agency and the Swedish Biodiversity Centre) and their own DGIS-funded programmes, convened a multi-sectoral workshop to present and discuss experiences of the application of social/livelihoods M&E with development organisations, other conservation organisations tackling these same issues, and academia.

The workshop, held over two days in Cambridge in July 2007, aimed to generate pragmatic recommendations for conservation practitioners, which balance technical rigour with field realities. The first day focused on field level monitoring and evaluation, and the second on organisational frameworks (see *Annex 1*). On each day a series of themed presentations (see *Annex 2 for abstracts*) were accompanied by a facilitated discussion. Breakout groups on each day explored key topics and questions in more detail.

A note on definitions

Monitoring and Evaluation – Although not discussed explicitly at the workshop, it is worth noting that monitoring and evaluation are different, distinct and complementary activities, with different roles, occurring over different timeframes and at different points in the project management cycle. The former is a continuous or repeated exercise of data gathering designed to track changes in target conditions or indicators. The latter, whilst often relying on monitoring data, is less about measurement and more about understanding. It is a process of review and reflection, usually undertaken towards or after the end of a project.

Impact – in this context impacts are changes to some element or elements of livelihoods and wellbeing, or the enabling environment in which people live, that arise from the actions of an organisation or project.

Conservation vs. development organisations – it is acknowledged that the boundary between conservation and development organisations is blurred. Although conservation organisations primarily aim to conserve wildlife and its habitat, while development organisations primarily aim to reduce poverty, both types of organisation undertake initiatives focused on improving the livelihoods and wellbeing of the poor, and both are therefore concerned with assessing the impact of these initiatives.

Day 1 – Measuring the impacts of livelihoods initiatives at the field level

The first day of the workshop focused on the conceptual and practical challenges of methodologies used at the field level, with examples of both indicator-based and non-indicator-based methodologies from the conservation and development sectors (see *Annex 2 for more detailed abstracts of presentations*).

Session 1 – Experiences of conservation organizations

The AWF experience in measuring conservation livelihood impacts: approach, issues, lessons

Richard Hatfield, AWF

AWF have been developing and testing a framework to explore conservation costs and benefits to the community of a Samburu National Park in Kenya; whether impacts differ according to wealth, and the significance of non-financial impacts compared to financial impacts. The framework combined various, predominantly quantitative, survey techniques, with trained enumerators from the communities collecting data on community-defined indicators.

There are many challenges to this system, including the practicalities of collecting such data and calculating absolute values. The Participatory Economic Valuation component of the framework was very valuable for communication with communities, and using community enumerators was important for building local relations and capacity.

The Big Lottery Fund Monitoring Framework: An experience from southern Ecuador and northern Peru

Bruno Paladines, Cultura y Naturaleza

Ecuadorian NGO Cultura y Naturaleza has been applying the Big Lottery Fund's 'tracking tool' in a community based natural resource management project in the dry forests of Ecuador and Peru. The tool monitors project outcomes, and requires community grant recipients to track their annual progress against a set of cross-cutting outcome milestones such as: capacity building; influencing opinion; networking and collaboration; participation; and gender and diversity.

The approach has many significant strengths, including its flexibility, its ability to integrate important components of development (process and impact, multiple dimensions, including the environmental one); its ease of use; inclusion of the local context; and combining quantitative and qualitative information.

Monitoring social impacts of conservation interventions without indicators

Lizzie Wilder, FFI

FFI has been piloting a non-indicator-based monitoring method called Most Significant Change (MSC) in a Human Elephant Conflict project Cambodia. The method uses factual stories of change related to project interventions to detect qualitative, intangible or unexpected outcomes and impacts often overlooked by conventional methods. Instead of indicators the method uses broad categories or 'domains', based on project objectives. MSC is designed to be complimentary to conventional monitoring methods.

Although the method is time-consuming, it has many benefits beyond simply gathering stories of project success, for instance: it facilitates adaptive management; builds staff capacity, and can promote project-community relations.

Facilitated Discussion of Session 1

The discussion was predominantly oriented around the apparent division between quantitative, indicator-based monitoring and qualitative story-based monitoring.

There was discussion about the value of Participatory Monitoring and Evaluation, and how – in the Kenyan case study - training community members as enumerators was valuable for capacity building and empowerment.

When discussing different types of monitoring, some felt that it is not so important what methods were being used – quantitative or qualitative – but that the time spent with the communities makes the difference to project-community relationships, which are so important for project success. However, capturing the lessons learnt from spending time with communities is challenging. It was suggested that this is one of the benefits of a story-based approach like MSC.

MSC was discussed at length. Some welcomed its subjectivity and its ability to attribute causality and capture unexpected results and qualitative, intangible changes. Other elements that were perceived as beneficial were the participatory nature of the method and its resulting ability to build capacity, and the feedback mechanism which results in strong adaptive management.

Others expressed reservations about this subjectivity; the reliability and replicability of the data; its independence from a logical framework, conceptual model or baseline. There was discussion about whether these social-science techniques can or should be carried out by people without specific training. Many conservationists are natural scientists, who are more used to measuring biophysical parameters than to collecting and using story-based data. They will require support to build their capacity for such activities.

There was a brief discussion about alternative techniques used to capture stories, such as audio and video. Participatory Video is a powerful tool to capture local perceptions of change, but is relatively expensive and requires skilled facilitation. One of the advantages is that the output can be used both with the same community and with other communities to compare and contrast impact.

There was some confusion as to whether MSC is a management or monitoring tool, but it was explained that the method achieves both. It was emphasised that MSC should not be used in isolation from other conventional, quantitative, log-frame-based methods, and there was general agreement that different techniques should be employed together to compliment each other. In social science research, qualitative tools are often used at the outset of the process to identify relevant indicators, which are then further explored through quantitative surveys. MSC can and should be used throughout project implementation as an evaluative monitoring and management tool.

Session 2 – Experiences of development organizations

Socio-economic monitoring protocols in Cambodia

Sarah Milne, Geography Department, University of Cambridge

The socio-economic impact monitoring framework of a cross-sectoral conservation and development project in Cambodia was designed by the development partners, and was intended to be rigorously 'scientific'. Third-party enumerators were employed to conduct household surveys using quantitative indicators.

The methods were limited in their ability to demonstrate causal links, and the value of control experiments and qualitative data was raised. It is very important that indicators are context-specific. The data were collected by external third-party enumerators rather than community-members because of the partners' requirement to emphasise data quality rather than level of participation. The absence of qualitative data was due to the stipulations of the partners. The need for control villages had been considered by the project.

Using ActionAid's Critical Stories of Change methodology to explore organisational impact on social change

Kate Carroll, ActionAid

Recognising that change does not happen linearly or 'tidily' as in a logical framework, ActionAid has developed an evaluation tool which attempts to facilitate learning at every level. Stakeholders undertake a participatory learning process to explore how change in a project (both positive and negative) takes place from the different perspectives, and how ActionAid is involved. The learning process results in a narrative 'Critical Story of Change' (CSoC) which, unlike a conventional case study, is critical and journalistic.

Despite being time-consuming, the process of CSoC is valuable for those taking part, and produces detailed, useful accounts from which others (both internal and external to ActionAid) can learn, and promotes further dialogue and change.

Facilitated Discussion of Session 2

There was discussion about the rigour of the CSoC approach. ActionAid feel that this approach is rigorous: inclusion of such a high level of contextual information, and critical analysis of the entire process of change, investigates and exposes all elements of the project and leaves implementers with 'nowhere to hide'.

The group discussed whether it is possible to develop a generic set of indicators for socio-economic monitoring. It was felt that generic indicators must be complimented by site-specific indicators. The wider link between programme (field level) learning/monitoring/management and organisational learning was also discussed, and it was felt that there should be a strong link between the two levels.

Organisational level monitoring is often externally driven by donor requirements but it was suggested that, by investing in more relevant field-level indicators that are capable of measuring meaningful change at the local level, we may be better able to satisfy organisational and donor requirements. By demonstrating the value of locally-derived indicators we will be more likely to influence donors to ensure that their reporting requirements are appropriate instead of a burden.

Breakout groups on Day 1

The participants were divided into four groups to discuss four different topics. Each group spent 25 minutes addressing one topic, with a rapporteur taking notes of discussions on flipcharts. Each group then swapped with another, and addressed their new topic using the previous group's flipchart notes as a starting point. All four teams then reconvened to share their responses.

Group 1: The why, who, what and how of monitoring

This group discussed the following questions:

Why do we monitor and for whom do we monitor?

Monitoring is a response to a commitment. Among all the groups the monitoring process is performed for, donors are often the most influential. The question 'who the organisation is monitoring for?' can sometimes be synonymous with 'who is funding the M&E?'

Many different stakeholders are involved in the monitoring procedure: donors, headquarters staff, field level staff, partners and beneficiaries. Each group sees the monitoring process as a tool to achieve a particular purpose. According to these different aims, monitoring tools can be used to obtain information useful for institutional learning, project management and decision making and also as a guarantee of the transparency and accountability of the organisation.

What do we monitor?

Ideally, we would monitor the long term impacts of the intervention. However, this is often impossible, and we must therefore find some interim measure which, based on assumptions in the conceptual framework, will demonstrate progress towards the intended impacts of the interventions.

The need for in-depth monitoring elucidating the complex dynamics of any intervention must be balanced with the need for a manageable process, reflecting the principle of 'minimum to assess' (i.e., collecting the minimum amount of data possible). It can be limited by resource constraints such as time, money and capacity. *What* we monitor also depends on the willingness of respondents to collaborate.

How do we monitor?

Training and capacity building are essential at every level and stage of the process. Partnerships are also important. (*see other groups' discussions for more detail*). To conclude, the group noted that although 'why do we monitor?' and 'who do we monitor for?' tend to coincide, they should not determine 'what and how do we monitor?'

Group 2: How best to build capacity for livelihoods impact in M&E?

The group identified three sub-questions:

What skills/training/experience do people need?

Dedicated skills and expertise (or access to expertise) are needed in-house, and training is essential, particularly as few conservation staff have training in the required socio-economic practices.

Organisations have a duty and responsibility to build an organisational culture that stresses the critical importance of M&E.

How do we best share/build capacity with partners?

Partnership is an important tool affecting capacity development in any phase of the monitoring process: before (training and planning); during (data collection: not only from partners but with

partners) and after (partners should be involved in the development of a reflective and learning capacity).

How do we cover the cost of M&E?

Organisations must integrate the costs of M&E into project plans and funding proposals. Within many of the larger conservation organisations, operational planning is undertaken separately from strategic planning, leaving M&E without funding. M&E should, instead, be built firmly into the project cycle.

The group highlighted some factors that have the potential to improve capacity building practice within an organisation:

- M&E champions or enthusiasts - preferably in an influential position – who can motivate and inform others.
- Commitment from central office and senior level staff.
- Active M&E practice at the field level, which can influence the central office through actions and demands.

Group 3 – Comparing strengths and weaknesses of indicator and non-indicator based approaches to livelihoods impact measurement

The group focussed discussion around three main points:

The main characteristics of indicator and non-indicator-based techniques

Indicator-based techniques	Non-indicator-based techniques
<ul style="list-style-type: none"> - Measurable - Has parameters - Can be quantitative - AND qualitative - Time frame - Specificity 	<ul style="list-style-type: none"> - Open (no parameters) - Process is important - Descriptive, narrative, context

The group decided that ‘qualitative vs. quantitative’ is a more appropriate division and that, since the day’s discussions had suggested that both types of system have strengths and weaknesses, it would be more interesting question to focus on the suitability of the two types of system. In this context, reflecting the nature of the day’s discussion, ‘qualitative’ here refers largely to story-based methods.

The main characteristics of qualitative and quantitative techniques

Quantitative methods	Qualitative methods
<ul style="list-style-type: none"> - Precise, measurable - Repeatable - Objective - ‘Rigorous’ - Enable predictions/projections from time data (models and graphs) 	<ul style="list-style-type: none"> - General, big picture - Participatory - Subjective - Suitable for intangible concepts (power relationship, well-being) - Capture unanticipated changes - Retain contextual information - Enable causal links to be established

How these methods can be used together

It is clear that there is an overlap between the characteristics of the two groups, as many of these features depend on the approach and the process used. The suitability of any method will depend on the monitoring requirements.

Rather than choosing between the two systems, they should be used as an integrated approach to compliment each other, and compensate for the other's inadequacies. In particular, stories (used by the group as an example of qualitative method) could be used together with quantitative indicators, to explain causal links between quantitative indicators, and capture unanticipated changes (for which there are no indicators), thereby helping to revise hypotheses and triangulate data.

The group felt that subjectivity is an advantage in a story-based monitoring system, and applying objectivity and quantification – which are more appropriate for evaluating the significance of quantitative indicators – will reduce narrative data to simple statements, and can denigrate the method and overlook its real potential.

It is also important to note that numbers are not necessarily more rigorous than qualitative, story-based data: quantitative data can 'hide' detail, context, causal links, etc.

Whichever method is employed, understanding the way the data is collected, reported and used is very important to avoid biases and inaccuracies. Reporting the degree of variation in story-based approaches increases its validity.

Group 4 – Participation in this process: how to make it work in practice

The group identified four main points of discussion related to participation in M&E

Who defines what is measured?

Those having input into deciding what should be measured could include a wide array of intended beneficiaries, partners and donors.

Who should be involved in M&E?

Both community-managed and externally-managed monitoring processes have their pros and cons, but certain groups should be involved:

- 'Owner' of the project
- Project staff trained in M&E techniques / M&E specialists
- 'Subjects' – intended beneficiaries. There was discussion as to whether the subjects should be selected because of their willingness to be involved (i.e. self-selected), or whether they should be randomly chosen, to produce a more accurate representation.

Monitoring should be internalised and ongoing at intervals throughout the project cycle, whilst evaluation should involve both external and internal evaluators.

What are the challenges to participation?

Some parties may be unwilling to be involved in the process, due to:

- Lack of understanding of the purpose of participation
- Lack of a shared visions between project team and 'subjects'
- Lack of trust (willingness to share and risk of divulging illegal or compromising information)
- Language and cultural barriers
- Lack of access and time for participation
- Power relations within the communities and with external project partners at different scales

Participants sometimes expect compensation or incentives for their participation. Project teams must decide whether this is appropriate. Project teams often lack training to deal with these issues.

How can we overcome these challenges?

- Providing training for project staff
 - Institutionalising the process
 - Scaling down expectations regarding the level of participation that is both valuable and practicable
 - Demonstrating the utility of M&E through actions and facts
 - Building trust by spending time with the target community
 - Providing feedback to subjects to improve their understanding of the process
 - Providing feedback to donors
-



A little bit of sunshine and punting always helps the learning and sharing process...

Day 2 – Measuring the impacts of livelihoods initiatives at the institutional level

Day two focused on institutional approaches to M&E and how organisational requirements from headquarters relate to the field level needs and activities.

Session 3 - Experiences of conservation organizations

Organisational Protocols for Measuring Socio-Economic Impacts – the case of AWF

Joanna Elliott, African Wildlife Foundation

AWF's monitoring framework is called PIMA, meaning 'measure' in KiSwahili. It measures capacity, activity and impact at the three levels: organizational, program and project. So far, only one of AWF's five intervention strategies (enterprise development) has integrated socio-economic monitoring into its PIMA framework. Baseline socio-economic measurement is being rolled out in the other intervention strategies, based on the quantitative survey-based method described by Richard Hatfield on Day 1 of the workshop.

Because monitoring takes place at the three hierarchical levels, the system provides information for both internal and external purposes. Indicators are defined by the AWF mission, donor requirements, and resources, rather than being locally defined. Whilst this facilitates scaling up and aggregation of data, the indicators are of limited local relevance.

Evaluating livelihoods impacts – Institutional Approaches and Challenges

David Thomas, BirdLife International

Because BirdLife International is a partnership organisation, it does not have a programmatic framework for M&E. Indicators are developed for individual projects and then scaled up to demonstrate the programmatic and organisational impacts.

An analysis of project-level indicators was performed, which grouped 122 livelihoods indicators using the OECD DAC poverty guidelines, the Millennium Development Goals (MDGs) and the Sustainable Rural livelihoods framework, and demonstrating a wide variety of types of indicators, many of which scale up.

Not using a programmatic framework presents challenges: linking the local level actions of partners to the global strategy; ensuring efforts are relevant at both the local and global levels, and creating a shared framework for communication and lesson-learning.

Tracking change – lessons from FFI's approach to understanding livelihoods impact

Matt Walpole, Fauna & Flora International

Like Birdlife, FFI does not have a common M&E framework. Instead, project managers are required to report the results of their own M&E processes into a common organisational annual reporting format, which are then aggregated for organisational-level reporting. The reporting format has recently been revised, and now makes explicit reference to livelihoods outcomes and impacts.

This system of relative autonomy at the project level suits FFI, with its involvement in many different types of programme at many different scales. However, there remain issues with demonstrating evidence for reported outcomes and impacts, as well overcoming problems of the diverse monitoring methods when synthesising across projects and scaling up.

Informal Presentations

Other conservation organisations present were invited in the day to give brief explanations of their institutional M&E frameworks.

David Wilkie – Wildlife Conservation Society

WCS uses a conceptual model to map the causal connection between project actions, threat reduction and conservation success. The conceptual model should be used for planning of interventions and the corresponding monitoring activities. Objectives are developed for each level of threat reduction, and indicators identified for each objective. In this way, activities and outcomes can be clearly linked to conservation targets.

Kate Studd – WWF-UK

WWF-UK is in the process of enhancing its livelihoods M&E processes, focusing on four methods to track key drivers of biodiversity loss:

- Reflections of Change: an evaluation tool similar to ActionAid's Critical Stories of Change (see page 4). Three projects will be chosen; external facilitators will help teams to 'unpack' the conservation-poverty links, and explore stakeholders' perceptions of change.
- Legacy Projects: revisiting programmes where WWF-UK's intervention finished 5 years ago, assessing the sustainability of the intervention, and exploring factors influencing sustainability.
- Project design processes: ensuring that potential livelihoods issues are analysed at the project outset, to improve project design (as with the above) -
- Improved use of quantitative indicators for feeding information into national policies.

Edgard Herrera – The Nature Conservancy

TNC designed a framework to measure success of a community-based project on the Nicaragua – Honduras border which aims to reduce land clearance by promoting horticulture as an alternative to cattle ranching. The project has been using indicators such as reforestation rates, forest area, and satellite-detected 'heat spots' to determine clearance rate through fires. Now, after 10 years, TNC is beginning to incorporate 'people-based' socio-economic monitoring in these programmes, such as the number of families cultivating vegetables, and the rate of successful land-titling.

Facilitated Discussion of Session 3

The group discussed the difficulty of articulating outcomes and impacts in terms of globally-recognised MDGs because there is little link between practical on-the-ground indicators used by the conservation community and those proscribed by the MDGs. However, it was noted that, whilst international targets must have indicators based on information that the UN has access to, nations are now permitted to develop their own, more specific and appropriate indicators.

It was suggested that, whilst Civil Society as a whole is contributing to all MDGs, we must accept that as conservationists we should focus on MDG 7 (ensuring environmental sustainability), and build alliances with others in order to demonstrate our contribution to the other goals.

The difficulty of capturing the value of ecosystem goods and services – one of the main livelihoods benefits of conservation projects – was also raised.

The costs of monitoring were discussed. In the small scale projects, monitoring can be a relatively large burden. However, the cost of failure is less for a small project, so it was suggested that small projects need not burden themselves with complex holistic monitoring frameworks – in other words, that monitoring efforts should be in proportion to the scale of the project.

The group discussed that often maintaining a *status quo* is in itself an achievement – e.g. conserving a habitat from further destruction. Often indicators are designed to measure a

change for the better, whereas a lack of change can be positive when compared with previous declines. This holds for both development and conservation organisations – e.g. in times of crises / wars / natural disaster, maintaining a minimum level of social services is an achievement.

Session 4 – Experiences of development organizations

How do development projects measure outcomes and what can conservation learn?

Bhaskar Vira, Geography Department, University of Cambridge.

This was a presentation of the study 'Thinking Critically about Change'¹ which investigated the M&E processes of six development organisations. The survey was conducted using available literature and telephone interviews with staff, largely in the organisations' central offices. The study found that the organisations approach M&E in very different ways, from strict indicator-based frameworks to qualitative learning-based tools. Development organisations, like conservation organisations, find this a difficult topic.

The report concludes that a key driver for a successful M&E system is creating an organisational culture of learning, and that conservation and development organisations have much to learn from each other.

Measuring Socio-Economic Impact in a Conservation Setting – Lessons from a Decade

Ann Koontz, EnterpriseWorks/VITA

EWV uses a household survey-based 'Impact Tracking System' (ITS) which employs 'process' (≡ outcome) indicators and impact indicators to assess success of enterprise programmes, viewed as improvement of socio-economic condition. EWV has an economic-based mission, to reduce poverty by increasing employment and incomes, thus the impact indicators are finance-based. The results of these quantitative surveys highlight areas where more qualitative investigation is needed.

EWV strives to integrate M&E into everyday activities so that it is not perceived as an additional chore. Feedback is provided to staff on the results of the process, which encourages participation in the monitoring system. The ITS has been widely commended, and other organisations have adopted the methods. However, EWV is learning that household surveys are not always sufficient, and is developing a group level tool and contemplating use of qualitative data to complement the ITS.

Informal Presentations

Other development organisations represented at the meeting were also given an opportunity to explain their work.

Alison Griffith – Practical Action

Practical Action works through technical programmes, thematic structures and 4 international projects. It established a Markets and Livelihoods programme 4 years ago, and invested in building a learning team to improve overall project performance and create a 'knowledge culture' within the organisation.

The programme has challenged bilateral donors for its unconventional approach. However, Practical Action feel that donor-driven M&E frameworks fail to elicit the same quality of

¹ The report 'Thinking Critically about Change: Experiences of Learning and Analysing the Impact of Projects on Livelihoods amongst International Development Organizations' by Arshiya Urveeja Bose was commissioned by FFI, Birdlife and the University of Cambridge Geography Department. A summary can be found in Annex 3 of this report.

information and learning, and are striving to promote lesson-sharing within the programme to improve programme performance. The global team comes together at annual 2-week meetings, where achievements, progresses, failures and challenges are discussed, and 'learning objectives' are developed by programme staff, rather than the central office.

This is a costly approach, but Practical Action believes it could consistently improve the organisational learning, as well as programme management.

Rick Davies – Independent consultant

Rick Davies is editor of MandE News (www.mande.co.uk) and an independent consultant. He chose to explain one tool he helped develop.

The Basic Necessities Survey was developed in 1997 by for use in development interventions in Vietnam in association with ActionAid Vietnam. It consists of a one page menu of 'basic necessities' (developed in a consultative manner with a focal group), including 'access to fresh water', 'metal roof', 'motor bike' and 'amount of leisure time'. Respondents are asked to identify which of these items "everyone should be able to have and no one should have to do without", and then, "which of these items does your household have?" A poverty rating is calculated from the results.

The survey focuses on items that are easily observable and measurable, thereby reducing potential for misunderstanding. However, its simplicity may overlook some of the complexities of poverty.

Facilitated Discussion of Session 4

The complex relationship between central office and field staff was discussed, in the context of attempting to meet the requirements of donors and the organisation, whilst ensuring M&E is useful at the field level.

The field staff were asked to give their personal feedback on the monitoring practices they are asked to use. They said:

- "Communication between field and central office needs to be two-way and not unidirectional. The central office should be sensitised to the needs of the field staff, and M&E should be a shared process."
- "The reporting framework requested by central office is often too long, but it does make us think more critically about our practices, and report more effectively."
- "Many frameworks are too complicated. Most partners and staff are only interested in biology! The form is boring for field staff to fill in – they would rather tell stories."
- "[Conservation International's 'risk assessment' system] was very arduous...but it was a valuable learning process, and the organisation 'grew up' as a result."
- "There is much interesting information that gets lost in the upper level reports. Feedback also gets lost, but that reflection and learning is very important."
- "M&E draws resources away from implementation. If you draw away too much, there's nothing left to measure."

These views demonstrate that, whilst some participants are frustrated by the demands of central office, others recognise the value of these processes both for their own capacity building and for that of the organisation. It was noted that in some cases there exists a 'them and us' attitude between central office and the field. Measures should be taken to reduce this.

It was suggested that the problems encountered by the development organisations revealed in the report 'Thinking Critically about Change' (see Annex 3) are similar to the ones which conservation organisations encounter, in particular those addressing livelihoods issues around Protected Areas, where dependency on natural resources is high. The two sectors should be able to learn together, and it is important that we determine how to foster this mutual learning.

Breakout groups on Day 2

After some discussion, four breakout group topics were identified. Participants were given a choice of which group to join, and groups explored the topic for an hour before coming together in a plenary session to present the findings and discuss further.

Group 1: Making links between project design, M&E, proving causality and capturing unforeseen consequences

Linking project design and impacts is important to prove that activities are responsible for the impacts caused and to check for unexpected or unplanned outcomes that might influence the project impacts.

The first step is to establish a conceptual model that shows the links between planned activities their intended consequences, and clarify the assumptions made about these links. It is important to expose the model to peer review (to test the validity of the model) and to remember that it is a model, hence a simplification of reality based on the analysis of a situation.

Measuring unexpected change is a challenge. Staff must be vigilant to notice unexpected consequences. Story-based methods can capture information about events that were not foreseen when the conceptual model was constructed. However, it is important to strike a balance between ensuring that unexpected outcomes and impacts are captured, whilst also focusing resources on the established project objectives.

Group 2: Scaling up and down: Incorporating evidence from the field into policy and ensuring policy is implemented on the ground

If evidence from the field can be scaled up and aggregated, it can be incorporated into advocacy efforts, and thus used to influence policy decisions. It is important to link evidence with that from other sectors, and find ways to translate 'our' data into the language of policy. If we can demonstrate how our efforts are contributing to the MDGs, the data will be more effective.

Influencing the policy discussions surrounding global targets requires a united effort by different sectors. However, lack of collaboration between the various actors can obstruct the flow of information and prevent such a collective impact. The first step is to build alliances with NGOs and private sector, not only conservation NGOs. Secondly, it is necessary to look for common areas (both with other sectors and with other scales within the same sector) and create platforms to influence and inform policy debate.

For policy influence to be credible, civil society must be involved: not just advocating for policy change, but also implementing the altered policy. Civil society encompasses individuals, community-based organisations (CBOs), associations of CBOs, NGOs, etc, but not all of civil society will be equally appropriate for the role of advocacy; not all will be 'trusted messengers'. It may be necessary for international NGOs to have a role in building civil society if it does not yet exist, for instance in post-conflict situations. Various delegates cited examples of successful interventions that had supported the development of CBOs. However advocacy should be a community-owned process: civil society should be able to analyse data from the field and feed it into the policy arena – conservation NGOs should not be doing it for them. Capacity building may be necessary to facilitate this.

Group 3: Collecting and processing data, and learning from it; cherry-picking vs. comprehensive surveys

From an organisational perspective, there are challenges in choosing what data to collect, and how best to process and evaluate it. Is it best to: a) perform a wide - but shallow - analysis of all projects in an organisation's portfolio; b) take a random sample, or c) 'cherry-pick' some mature case studies and do deeper analysis of these?

The availability of data is the first determinant to what data should or can be collected. In many cases it may not be possible to complete a comprehensive survey of all projects, due to limited time or resources.

The rationale for the monitoring will also dictate what sort of information is requested. For demonstrating accountability to donors or the Board of Trustees, a wide analysis may be required, from which aggregate data of performance across the portfolio can be produced. For organisational learning, fewer in-depth case studies will be more valuable. The wider analysis could be used to indicate which projects would make the most interesting case studies.

Before processing data, it is important to determine the validity of the data. There are various reasons why data may be invalid, such as respondent bias. This can be minimised through the design of tools and preparatory work, such as explaining the tools to the respondents and obtaining their buy-in. Triangulation can be used to validate some data.

The process of analysing data will depend on a) what sort of data is available and b) what is needed from it. It was felt that qualitative data collected at field level can be analysed and processed at the organisational level because it has sufficient contextual detail, although it should be handled by someone with social science skills.

Figures without their context can be misleading, and those involved in collection and analysis of quantitative data must be trained, and the methods used must be clear. There should also be a strong link between the collector and the analyser – with collusion on the design of the tools (survey, questionnaire etc) and the nature of the conclusions that can be drawn from the data.

The group observed that data often produces more questions than it answers, and agreed that what can be learnt from the data depends on the methods used to collect it, with rich narrative 'cherry-picked' case studies providing more valuable organisational learning than a comprehensive survey. Lessons from either type of data should be used at the organisational level to input into subsequent strategic plans.

Group 4: Learning processes within and between development and conservation organisations

There is often overlap and complementarity between the objectives and activities of conservation and development organisations, particularly at the local level. These similarities could be the basis for beneficial collaborations for learning and improved performance.

Learning should be a two-way process, acknowledging and appreciating different perspectives, and accepting and accommodating differences.

Some suggestions to foster collaboration

- Effective coordination and communication, to avoid conflicts and misunderstandings. e.g. regular meetings/joint workshops
- Open-house meetings
- Joint fora
- Joint advocacy efforts
- Joint project implementation
- Clarifying the benefit to each party from collaborating in terms of more effective achievement of organisational goals.

Suggestions for achieving effective learning through collaboration

- Elaborate strategies together (joint planning and monitoring; peer review)
- Negotiate on common objectives
- Staff exchanges between organisations (at all levels)
- Create a pleasant and stimulating learning environment

- Ensure strong leadership that pulls together efforts to collaborate
- Remember that learning is not always accumulating new information – sometimes it is about ‘unlearning’ – putting aside old paradigms
- Remember to learn from both positive and negative outcomes

These steps involve the exchange of experiences and lessons. The whole process requires a balance between what is given and what is taken, in order to avoid misunderstanding and resentment.

Challenges to effective collaboration

- Lack of resources for learning (personnel, time and money).
- Weak leadership and weak organisations.
- Non-integrated, or conflicting, policies.
- Perceived competition for funding from presenting the same objectives. However, some donors may prefer to invest in joint partnership approaches to conservation and poverty reduction.

Next steps from this workshop

At the end of the workshop the group came together and discussed the ways to move forward after this workshop. The key desire expressed was to promote more inter-organisational communication and collaboration wherever possible. Mapping M&E methods used by conservation organisations, in a reciprocal way to how ‘Thinking Critically about Change’ (see Annex 3) investigated M&E by development organisations, would be a good starting point. Two principal recommendations emerged:

- Make the information discussed at this workshop available both to participants and a wider audience. This could be done by feeding in to existing learning processes and groups, which could also be used to share ideas, tools, experiences and lessons:
 - The Poverty and Conservation Learning Group (PCLG) - <http://www.povertyandconservation.info/> - an initiative coordinated by the International Institute for Environment and Development (IIED). The goal of the Learning Group is to facilitate learning on conservation-poverty linkages between practitioners in the North and South. The PCLG has a space for downloading of the workshop outputs; a tools and methodologies section and an on-line discussion facility.
 - REMAPP - <http://groups.yahoo.com/group/REMAPP/> - a UK-based network of professionals concerned with planning, appraisal, monitoring, evaluation, research and policy issues in aid agencies. REMAPP is coordinated with very little administrative burden through a web-based ‘group’ and meets on an ad-hoc basis.
- Repeat this workshop at the regional level, building on the results from this meeting and exploring relevant tools and frameworks in more details. Such regional meetings could be used to promote M&E champions in-region and to facilitate more inter-organisational communication, particularly between conservation and development organisations working in the same areas. Outputs from this and any regional meetings could be used to develop a tool-kit for practitioners.

Annex 1 – Workshop Agenda

Day 1 - Wednesday 18th July - Focus on field methodologies		
0830	Registration - Bennett Room, Memorial Court	
0900	Welcome and keynote presentation	
Session 1: Experience and lessons from conservation organisations in the field		
0945	Case Study 1	Richard Hatfield – AWF
1010	Case Study 2	Bruno Paladines – <i>Cultura y Naturaleza</i>
1035	Case Study 3	Lizzie Wilder – FFI
1100	<i>Tea & Coffee</i>	
1130	Facilitated Discussion	
1300	<i>Lunch – The Great Hall</i>	
Session 2: Experience and lessons from development organisations in the field		
1400	Case Study 4	Sarah Milne – <i>University of Cambridge, Geography Department</i>
1430	Case Study 5	Kate Carroll – <i>ActionAid</i>
1500	Facilitated Discussion	
1530	<i>Tea & Coffee</i>	
Break-out Groups		
1600	Break-out groups	<i>Various topics</i>
1700	Plenary Discussion & Conclusions	
1730	Wrap-up	Summary of day 1 and introduction in to Day 2
1830	<i>Punting on the River Cam</i>	
Day 2 – Thursday 19th July – The organisational perspective		
0830	Registration in Bennett Room, Memorial Court	
0900	Review of Day 1 and introduction to Day 2	
Session 3: Experience and lessons from conservation organisations		
0930	Case Study 6	Joanna Elliott – AWF
0950	Case Study 7	David Thomas – BL
1010	Case Study 8	Matt Walpole – FFI
1030	Informal presentations: David Wilkie – WCS; Kate Studd – WWF UK; Edgard Herrera – TNC	
1100	<i>Tea & Coffee</i>	
Session 4: Experience and lessons from development organisations		
1130	Case Study 9	Bhaskar Vira – <i>University of Cambridge, Geography Department</i>
1200	Case Study 10	Ann Koontz – <i>Enterprise Works/VITA</i>
1230	Informal presentations: Alison Griffith – <i>Practical Action</i> ; Rick Davies – <i>MandE</i>	
1240	Facilitated Discussion	
1300	<i>Lunch – The Great Hall</i>	
Break-out Groups		
1400	Break-out Groups	<i>Various topics</i>
1530	<i>Tea & Coffee</i>	
1600	Plenary Discussion: What next?	
1700	Wrap up	

Annex 2 – Presentations Abstracts

The AWF experience in measuring conservation livelihood impacts: approach, issues, lessons

Richard Hatfield, African Wildlife Foundation, Nairobi

This presentation will focus on a framework developed and tested by AWF to explore conservation socio-economic impact assessment. It will consist of 3 main parts:

- (i) Methodology: criteria, main features, and methods used
- (ii) Initial results for the case of communities bordering Samburu National Reserve, Kenya
- (iii) Issues, lessons learned, and moving forward

Methodology

The main questions centre on: 'what are the conservation-related cost and benefit impacts, particularly at household level, and how significant are they?' Secondly, 'do impacts differ according to wealth/poverty status?' A key related question is 'how significant are non-financial impacts compared to financial impacts (i.e. financial vs. economic impact)?'

The methodology consists of 5 stages conducted through 2 rounds of fieldwork: (1) an RSIA (Rapid Social Impact Assessment), to determine relevant impacts at the household level (2) an HES (Household Economic Survey), to value the financial impacts identified by the RSIA (3) a PEV (Participatory Economic Valuation) conducted by each household to determine non-financial impacts identified by the RSIA (4) FDGs (Focal Discussion Groups) to validate results (5) Community Financials – to ascertain financial benefits/costs accruing to the community than household level. Stage 3 involves use a financial 'numaire' in order to link - and therefore equate in terms of value - financial impact values to non-financial impact values. The household sample was stratified by wealth group, with a sample equivalent of 30 households per wealth group (i.e. 120 households in the case of 4 different wealth groups, but weighted for percentage of households in each group - for example, 60 'very poor' households were surveyed if the 'very poor' made up 50% of the population).

Initial Results

In the Samburu National Reserve case, households incur a net loss of USD 1430 (USD 1300 in benefits and USD 2730 in losses) on average per year. The community as a whole incur USD a net economic loss of USD 1.2 million annually (USD 1.4 million in benefits and USD 2.6 million in costs). Non-financial benefits outweigh non-financial costs by a factor approaching 2:1; non-financial benefits also outweigh financial benefits by a factor of 2:1. However, financial costs outweigh non-financial benefits again by a factor of 2:1, which make the former the main driver of net losses.

Out of the top-ranked 10 of 31 impacts valued across the community sample, negative impacts ranked 1 (livestock predation from wildlife), 2 (livestock disease transmission from wildlife), 3 (loss of grazing access due to the PA), 5 (loss of grazing quality outside the PA), 7 (loss of water access for livestock) and 8 (loss of access to timber and firewood); whilst positives ranked 4 (increased security for people), 6 (improved knowledge and exposure), 9 (road provision) and 10 (improved access to livestock markets). For perspective, PA-related 'employment' ranked 13, whilst 'tourism-related income' ranked 26.

Results also showed that all wealth groups suffered net losses, but that the richer wealth groups incurred the larger losses.

Issues, Insights and Lessons Learned.

- Even simple is complicated! Even in a simplified framework such as this, there are a myriad of technical issues, especially in arriving at absolute values.

- There is a real challenge in having households distinguish between (i) conservation impacts vs. other impacts and (ii) impacts on their households vs. on the community as a whole.
- Careful translation of surveys, enumerator training, and test practice are critical for quality control.
- The PEV was probably the most valuable component. As well as being an interesting exercise for households, it's real value was perceived in articulating the relative magnitude of specific impacts, as well as weighing positives vs. negatives. It shows specific potential value both as a communication tool, and in informing how interventions might be modified for better results.
- The non-financial results are significant in magnitude.
- Absolute valuation is difficult. The choice of which financial 'numeraire' affects valuation – and hence significance - of financial vs. non-financial amounts quite markedly. This aspect requires more refinement.
- Poverty adjustment is required. Results for the wealth groups need to be 'poverty-adjusted' i.e. to ascertain significance of a household's net loss compared to its 'total income / welfare'. This recognises that although the richer households may be incurring larger net losses in absolute terms, smaller net losses may be having a greater impact on the poorer households.
- Valuation improves given multiple iterations e.g. first ranking before valuing; group settings for quality control, etc.
- Standard vs. situation-specific indicators. This methodology used a standard set of indicators. On reflection, it would have been more useful to also include site/project-specific indicators. For example, a mixture of project-specific and generic indicators could be developed and included at the RSIA stage. Such an exercise was carried out for this site, using a mixture of community-determined and AWF-determined indicators based on the project/intervention objectives.
- The double-counting danger. Impact types need refining to distinguish between e.g. inputs vs. outputs (e.g. value of 'road' development vs. value of 'transport' as a service).
- The scaling-up issue. Who are the community / target population to whom one is scaling up sample results? Are they one and the same?

The Big Lottery Fund Monitoring Framework: an experience from southern Ecuador and northern Peru

Bruno Paladines, Cultura y Naturaleza

The dry forest region of south-western Ecuador and north-western Peru, or the Tumbesian region, is one of the most biodiverse areas in the world and is one of the top priorities for global conservation. Its ecosystems, however, are some of the most threatened globally. It is estimated that only 1 to 5% of the original forest cover remains and less than 3.4% of the lowland forests of Ecuador have some protected status. The rural population is one of the poorest in Ecuador and Peru.

The La Ceiba-Pilares project is a bi-national initiative implemented in the county of Zapotillo, Ecuador, and the neighbouring district of Lancones in Peru. Its purpose is to strengthen capacities of the local people to improve their living conditions through the sustainable use of the region's natural resources, recognizing at the same time the bi-national context in which these people live and their dependence on the use of such resources for their livelihoods.

The project's principle funder is the Big Lottery Fund, which distributes money raised by the UK the National Lottery. Following an introduction to the region and the project, this presentation discusses experience with applying the monitoring framework or 'Tracking Tool' provided by the fund. This tool focuses on monitoring project outcomes, and also requires grant recipients to track their annual progress against a set of cross-cutting outcome milestones covering: capacity building; influencing opinion; networking and collaboration; participation; and gender and diversity.

It is concluded that the approach has many significant strengths, including its flexibility, its ability to integrate important components of development (process and impact, multiple dimensions, including the environmental one); its ease of use; respect of the local context; and recognition of the value of quantitative and qualitative information.

Monitoring social impacts of conservation interventions without indicators

Lizzie Wilder, Fauna & Flora International

Over 85% of FFI's projects across 40 countries involve some engagement with local communities, ranging from awareness-raising to alternative income generation activities to forming social networks and encouraging empowerment.

Some projects do not monitor these 'livelihoods' activities at all, often due to lack of resources or capacity. Many projects focus their monitoring efforts on activities and outputs. For outcome and impact tracking, traditional, indicator based tools such as socio-economic surveys, semi-structured interviews and focus groups are used.

Even when indicator-based monitoring methods are employed successfully, there are limitations. Causal links between the intervention and the observed change cannot be proven. Qualitative information about intangible but important changes such as well-being and reduced vulnerability is overlooked, as are unexpected changes and anecdotal evidence. And even participatory methods provide little opportunity for adaptive management based on feedback from the information.

Over the last year, FFI has been piloting 'Most Significant Change' (MSC) – a tool used in the development sector but not widely used in conservation. This presentation will outline MSC and explain our experiences.

- MSC is a **simple method** for systematically capturing stories of impact from stakeholders and staff, and evidence for these changes. It is complementary to – not a replacement for – conventional monitoring methods.
- The **experiences** from the three MSC pilots: the Hoang Lien Son Project in Vietnam, the Mpingo Conservation Project in Tanzania, and the Cambodian Elephant Conservation Group
- The **strengths** of MSC: It is outcome and impact-focused. It tracks qualitative information about intangible changes. It provides evidence about causal links. Furthermore, the discussion meetings provide an opportunity for adaptive management and team development.
- The **weaknesses** of MSC: It is time consuming and requires intense effort to implement fully. There are accusations of lack of rigour.

The presentation will conclude that this is a very useful tool, with much potential. However, successful implementation requires such intensive effort that in some cases it may not be cost-effective.

Socio-economic monitoring protocols in Cambodia

Sarah Milne, Geography Department, University of Cambridge

This presentation is a case study of efforts to monitor the socio-economic impact of a 'conservation and development project' in Cambodia. The project is led by Conservation International, however a significant number of activities rely upon partnerships with development NGOs, both international and local. This combination of organizations and activities has resulted in socio-economic monitoring protocols that meet multiple information needs, and draw upon practice in both conservation and development sectors. This

presentation will describe: (i) how and why the socio-economic monitoring system was designed for Conservation International and partners; and (ii) the experiences and lessons learned in the process of implementation.

Why was the monitoring system implemented?

- Review and clarify the objectives of monitoring in this case.
- Describe the institutional context, which was a key factor in motivating and shaping the design of the monitoring system.

How was the monitoring system designed?

- The design process began with a review of existing methods and practice, both in Cambodia and internationally. The development sector was the main source of information for tools and methods.
- Review the key tools and methods that were incorporated into the monitoring protocols, and describe how they were chosen.

What are the key elements of the monitoring protocol that we have adopted?

- Describe the monitoring framework and indicators.
- Describe methods for data collection, management and analysis.
- Discuss issues such as: baseline data, frequency of monitoring, sample size, data quality, and the integration of monitoring with existing efforts (particularly those of CARE and CEDAC) in the development sector.

What are the main insights and lessons learned?

- There are challenges in demonstrating impact and causal linkages rigorously, so we will trial the use of control data and comparative methodologies.
- Quantitative indicators have limitations, so it is important to draw upon qualitative data as well.
- General monitoring frameworks are useful at an institutional level, but indicators must be context-specific in order to be meaningful.

Points for further discussion:

- Participatory definition of indicators
- Sharing data with local stakeholders

Using ActionAid's Critical Stories of Change methodology to explore organisational impact on social change

Kate Carroll, ActionAid

ActionAid, like many other organisations, often makes claims for its work and achievements. Yet, in the struggle to address the causes of poverty and injustice, ActionAid is often one of many players. What organisations rarely get to know is the significant nature of its contribution and the factors (both internal and external) that contributed to its outcomes.

Critical Stories of Change are a new learning initiative in ActionAid; they are the result of a facilitated learning process and aim to explore how change (both negative and positive) happens from the perspective of different stakeholders.

This presentation will explore the value of the Critical Stories of Change methodology in deepening analysis and understanding of social change in development work, focusing on the following areas:

How do the Critical Stories of Change fit with ActionAid's existing Accountability, Learning and Planning system (ALPS)?

ALPS lays out a framework for involving communities and partner organisations closely in all aspects of ActionAid's programme work, including planning, budgeting, monitoring and

reviewing. The different strands of ALPS are linked and so the learning from the Critical Stories of Change feeds into both accountability reflection and planning work.

What are Critical Stories of Change?

CSoC are a series of stories which describe the role ActionAid plays in changing the lives of people living in poverty. They are process driven, open, self critical and detailed, and they celebrate the active role of others. As such they are far removed from traditional 'good practice case studies'.

What are their strengths?

Due to being process driven, CSoC are sustainable review and reflection documents, their lively style and analytical rigour lend them to reading by donors, researchers and field workers alike.

What are the challenges?

CSoC are necessarily time consuming and require capacity building. Sensitization to the importance of investing in review and reflection is vital.

The presentation will draw on the four existing and two draft Critical Stories of Change; from India, Kenya, Brazil, Brussels, Rwanda and Uganda. The Uganda story will be the main study. It looks at ActionAid's role in securing land rights for the Benet people in Northern Uganda, and the arising issues concern both environmental and development NGOs.

This presentation aims to provoke discussion around whether the Critical Stories of Change methodology can be used in measuring the impacts of social/livelihoods work in the conservation sector, and what adaptations this might require.

Organisational Protocols for Measuring Socio-Economic Impacts – the case of AWF

Joanna Elliott, African Wildlife Foundation

This presentation will explore the rationale and emerging approach adopted by AWF in its efforts to measure the socio-economic impact of its landscape level conservation program in Africa. It will build on the presentation given by Richard Hatfield on Day 1 that will have outlined a specific AWF measurement methodology as applied at 'priority intervention' or 'zone' level.

AWF has a reasonably well developed overall PIMA M&E system, measuring capacity, activity and impact indicators at project, program and organisational level. It serves a number of internal and external purposes. However, to date, socio-economic parameters have only been actively integrated into one of five intervention strategies i.e. into enterprise work, and these need revisiting. Plus the other four types of intervention (land, leadership & capacity building, research/species and policy work) also have socio-economic impacts that need to be more objectively monitored. So we are now beginning to roll out a two-year program of baseline socio-economic measurement across all key priority interventions and zones for each of eight landscapes, using adaptations of the methodology presented by Richard Hatfield.

Key aspects of the AWF protocol to improve socio-economic impact measurement

- All interventions with expected significant impacts (positive or negative) to be monitored.
- Indicators of socio-economic impact to be generated by those impacted from tested lists of measures, to include measures that can be aggregated.
- Baseline measurements at household level to be taken, with appropriate monitoring surveys every 2-5 years depending on site/indicators selected.
- Numbers of households surveyed and selection of households to be carried out in line with agreed best practice.
- Surveys to be carried out by trained enumerators from local communities, and interpreted with use of focal groups.

Key unanswered questions

- Will our measures give meaningful and useful results? Would ‘story-telling’ and more subjective approaches yield different results?
 - Will we be able to make this meaningful and yet cost-effective? We’re budgeting an average of \$5,000 per priority intervention/zone p.a.
 - Will it be more effective to keep the process and expertise in house or to outsource (parts?) to local consultants?
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Evaluating livelihoods impacts – Institutional Approaches and Challenges

David Thomas, BirdLife International

This presentation will explore indicators-based approaches used by BirdLife Partner organisations to evaluate the livelihoods impacts of a programme of small grants.

The strategic objectives of the BirdLife’s International global partnership (2004-2015) include to “Promote and foster the links between biodiversity conservation and sustaining people’s livelihoods”, and global-level targets include making “a substantial, measurable and recognised contribution to achieving national, regional and global development targets”. When devising a system for assessing progress towards achieving these objectives, the challenges faced by BirdLife as an organisation are to:

- Link the local level actions of its Partners and supporters to the global strategy and programme
- Create a shared framework for communication and lesson-learning
- Be relevant at local to global levels

The presentation uses the results of an evaluation of livelihoods indicators used by 23 small grants projects from around the world, to examine how well indicators-based approaches achieve this. Based on this review the presentation concludes that linking local-level project impacts to ‘global development targets’ (such as the MDGs) is problematic for three main reasons:

- i. most projects are relatively short-term – indicators relevant to project impact measurement won’t relate directly to global development targets;
- ii. specific development priorities identified by local people aren’t necessarily included among the MDGs
- iii. the MDGs don’t address some important dimensions to poverty – such as political influence, a voice in decision-making, participation in institutions and socio-cultural belonging.

Tracking change – lessons from FFI’s approach to understanding livelihoods impact

Matt Walpole, Fauna & Flora International

This presentation will describe the ways in which FFI is working to improve its ability to track and demonstrate impacts on livelihoods and wellbeing across its global portfolio.

FFI’s mission is to conserve threatened species and ecosystems worldwide, choosing solutions that are sustainable, based on sound science and *take account of human needs*. Over 85% of our projects across 40 countries involve some engagement with local

communities, but until recently there has been no consistent means of assessing the impact of this work.

The establishment of a cross cutting 'Biodiversity and Human Needs' programme within FFI has stimulated the revision of FFI's organisational annual reporting system to make explicit reference to livelihoods outcomes and impacts within the context of its conservation work. In addition, a more comprehensive project planning, reporting and review process has been developed and trialled across a sample of 30 livelihoods-focused projects.

These initiatives have vastly improved the information on livelihoods outcomes and impacts available at an organisational level, whilst stimulating project managers to think more critically about their plans and achievements. However significant challenges remain, including:

- Achieving a consistent understanding of livelihoods, and consistent reporting, across the portfolio.
- Ensuring demonstrability: evidence for reported outcomes and impacts is often lacking, and not everyone sees the value of M&E.
- Dealing with diversity: choosing to avoid instituting a top-down FFI 'patent method' for monitoring livelihoods impacts means that different projects will do things differently. This has implications for scaling up.
- Adding value: ensuring best use is made of the information gathered, at every level.

Mainstreaming an organisation-wide improvement in livelihoods impact tracking needs more than a robust reporting structure and a central M&E unit. Training, guidance on both quantitative and qualitative M&E tools, and resources to implement appropriate M&E are all important. Facilitating free-flowing communication between staff and projects to share feedback, lessons and perspectives is also critical.

How do development projects measure outcomes and what can conservation learn?

Bhaskar Vira

Bhaskar presented the findings of a study of six development organisations and their approaches to M&E and learning (*see Annex 3*).

Measuring Socio-Economic Impact in a Conservation Setting – Lessons from a Decade

Ann Koontz, EnterpriseWorks/VITA

In 1993, EnterpriseWorks/VITA instituted a portfolio-wide impact tracking system (ITS). The ITS focuses on economic impacts and has been administered annually for all EWW projects since it was instituted in 1993. An independent, external review of the ITS called the system one of the best of its kind and to this day few organizations track economic impacts annually in a standardized manner across their entire portfolios. In 1995, EWW commenced its enterprise-based biodiversity conservation program. While many other EWW projects have environmental impacts, this program was new to the organization in that it explicitly combined conservation and socio-economic development.

Integrating conservation tracking into EWW's overall socio-economic-based M&E systems and the ITS became a challenge. This presentation explores how EWW dealt with this challenge, how the ITS evolved over the last decade, the challenges in collecting and analyzing the data, and how our organizations use the annual data in conjunction with other M&E instruments. The presentation will also explore how organizations beyond EWW are testing and using the methodologies and the issues that arose.

Some of the major lessons learned are:

- Traditional household level surveys are not always enough or the preferred instrument and that group level survey instruments are needed, especially in conservation-based projects;
 - Less is more – concentrate on collecting a few good pieces of data on a regular basis, rather than lots of data once or infrequently;
 - Quantitative and qualitative data have to be combined in concise formats collected on a regular basis to be effective;
 - Good impact tracking has to start before you actually have impact; and
 - The need to debunk the “all impact will be positive” myth.
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The participants at the end of the meeting

Annex 3 - Thinking Critically about Change

Experiences of Learning and Analysing the Impact of Projects on Livelihoods amongst International Development Organizations

Summary of a report by Arshiya Urveeja Bose

Introduction

When engaging in international development, good intentions are not enough: initiatives affecting livelihoods need to analyse and understand the impacts of activities. With the aim of meeting this need - and justifying their interventions to both public and donors - development organisations have invested in the elaboration and implementation of frameworks for planning and evaluating projects and, ultimately, creating a culture of Monitoring and Evaluation (M&E) within the organisation.

However, theory differs from practice: many constraints impede a straightforward implementation of the tools elaborated at the organisational level. These difficulties present a particular challenge to conservation-oriented NGOs engaged in livelihoods-related activities as part of their conservation efforts. These organisations are more comfortable with biological impact assessment, and are still relatively inexperienced in dealing with impacts on livelihoods.

Looking for insights and lessons that conservation NGOs can grasp from development NGOs' experience of impact evaluation, Fauna and Flora International, BirdLife International and the Department of Geography at the University of Cambridge commissioned a study in 2006-7. The resulting report by Arshiya Urveeja Bose, which provides a detailed analysis of six organisations' approaches to M&E, is summarised here.

Overview of frameworks used

The six organisations studied employ a wide range of M&E systems and frameworks, but generally they show a tendency to move away from the use of simple log frames and indicators towards a more complex evaluation system.

Systematic frameworks are not the only way to conduct impact assessment. In fact, some organisations consider traditional impact assessment methodologies (log frames and indicators) ineffective for measuring impacts, which are by definition unplanned and only apparent in the long term. In addition, some consider these methods expensive and ethically questionable, with communities seen as a means for the organisation to prove the validity of donors' investment. As a result, many organisations are experimenting with alternative methods to conduct impact assessment: open questions about changes in livelihoods and attitudes are often used to understand the nature of change and its consequences on people.

Of the organisations analysed, some base their systems on intellectual structures, such as DFID's Sustainable Livelihood Framework, the UN Charter on Child's Rights, or Amartya Sen's work on food entitlements. The organisations use these structures to define core components within which to measure change. One has defined a menu of indicators within these core components, another asks a set of broad questions to determine impact, whilst a third encourages inclusive assessment of its core dimensions of change.

One organisation takes a very broad view of impact assessment, considering this process an institution-wide activity, and employing a value-based framework to monitor fundamental changes – from staff attitudes and behaviours, to overarching institutional principles.

Other organisations do not employ a framework at all, choosing instead to provide a suite of indicators or monitoring tools from which project managers can choose, to build a locally appropriate M&E system which also fits the organisational ideal.

Experiences and lessons learnt

Having outlined the various approaches to M&E, the study finds that, despite these different approaches – which reflect different understanding of a problem and different cultural visions - all organisations agree on the advantages derived from the evaluation processes. They also highlight the challenges posed to their implementation and acknowledge key issues that need to be addressed.

Strengths

A first advantage derived from the use of M&E frameworks is the increased accountability and transparency to beneficiaries who, as a consequence, are more easily involved in the production of indicators: community-generated indicators. In addition, M&E tools are proven to be effective if their structure is both flexible and simple, and useful in stimulating learning processes, by forcing the staff to make time and space for analysis, and facilitating adaptive management. Finally, they help create or reinforce an organisation's cultural vision, which is an important condition for sound project evaluation.

Challenges

However, many factors, both methodological and organisational, challenge the implementation of M&E frameworks at the project level.

Many question the nature of the tools themselves. For instance, some consider indicators too quantitative. Conversely, the qualitative methods used are often thought too subjective. A lack of faith in the methodologies discourages staff from using them, negatively affecting the creation of a learning environment.

Lack of organisational support and weak management can also impede sound implementation of evaluation processes. In fact, without the necessary support, the creation of both a learning environment and a shared vision are undermined. In particular, weak management can create: technical frameworks that are disconnected to the reality on the ground; confusion over the purpose of project evaluation; lack of external and internal feedback; lack of proper training of unskilled staff; lack of promotion of M&E systems; unclear and destabilising power dynamics and no protection against external pressures.

These constraints can result in local project teams abandoning the organisation's systems and developing their own approach to M&E, which impedes scaling up.

Key issues

M&E is not merely a measurement exercise: indeed, the way in which organisations perform impact assessment can profoundly affect other core dimensions and values. As a consequence, properly addressing the following key issues could be crucial in overcoming the challenges above and, hence, enabling a proper impact assessment.

Accountability and stakeholders' participation in the project cycle needs to be strengthened, for example by using focus groups and stimulating the elaboration of community-generated indicators. **Partnership relations** can be improved through joint evaluations. By promoting both a better understanding of goals and principles and a **frank exchange of information**, this cooperation can indirectly result in the building up of a **trusting relationship** between the organisation and its partners. Removing obstacles such as lack of motivation and experience or unclear power dynamics can foster the **creation of a real learning environment**.

Strongly connected with this last aspect is the need to **internalise fundamental principles and approaches** of impact assessment into the organisation's vision, projects and staff. However, along with a sound and internalised vision, a **coherent management system** that enables the organisation to perform in accordance with its vision is also needed. The harmonisation between vision and system requires significant investment and effort from the organisation itself. It is necessary to stress the value of M&E processes, clarify their purpose and create a reliable information network.

Conclusions

Impact assessment may seem like an ‘exercise in pessimism’ – there are so many challenges that achieving a meaningful and realistic understanding of impact is unrealistic. However, the study concludes that solutions to the challenges can be found through organisational introspection, and awareness that the way a system is implemented is as important as the actual choice of method.

There are many lessons that conservation NGOs can learn from the experiences of the development sector, primarily:

- The majority of problems of carrying out M&E at a field level originate at an organisation level.
- Therefore, when trying to build an impact assessment system, one needs to examine the organisation’s culture or “set-up” as much as its evaluation methodology.
- Engendering a culture of reflection, learning and constructive criticism is the key to achieving a realistic understanding of an organisation’s impact. The onus for this should lie with senior management.
- Impact evaluation processes have significant outcomes for an organisation’s interaction with its intended beneficiaries, partners and employees. Therefore, these processes could be used as a platform to either fix or foster these relationships.

Perhaps, the very first place to start building M&E is to ask some basic questions. *What are we trying to do here? Why are we evaluating impact?* And these need to be more than operational questions. They need to be philosophical ones. Unless, an organisation has resolved these more visceral questions, it is unlikely that impact evaluations, learning and reflection will be seen as adding genuine value.

Annex 4 – List of Participants

Name	Affiliation
Bruno Paladines	Cultura y Naturaleza
Jane Gaithuma	BirdLife Secretariat Nairobi
Jacob Machekele	Nature Kenya
Patricia Ruggiero	Save Brazil
Tuan Anh Pham	BirdLife Vietnam
Abisha Mapendembe	BirdLife International
David Thomas	BirdLife International
John Fanshawe	BirdLife International
Jo Elliott	African Wildlife Foundation
Richard Hatfield	African Wildlife Foundation
Daudi Sumba	African Wildlife Foundation
Steven Kiruswa	African Wildlife Foundation
Jimmie Mandima	African Wildlife Foundation
Jeremiah Machavi	African Wildlife Foundation
Joss Swennenhuis	African Wildlife Foundation
Nyika Munodawafa	African Wildlife Foundation
Matt Walpole	Fauna & Flora International
Lizzie Wilder	Fauna & Flora International
Helen Anthem	Fauna & Flora International
Shelly Shao Yang	Fauna & Flora International
Jarkyn Samanchina	Bashat – Community Business Forum
Richard Sambolah	Fauna & Flora International
Cynthia Machado	Fauna & Flora International
Joy Juma	Fauna & Flora International
Arianna Granziera	Fauna & Flora International
Bhaskar Vira	University of Cambridge, Geography Department
Dilys Roe	International Institute of Environment and Development
Kate Studd	World Wildlife Fund UK
Edgard Herrera	The Nature Conservancy
David Wilkie	Wildlife Conservation Society
Sarah Milne	University of Cambridge, Geography Department
Ann Koontz	Enterprise Works/VITA
Kate Carroll	ActionAid
Rick Davies	MandE
Alison Griffith	Practical Action
Barbara Adolph	Tripleline Consulting
Karin Gerhardt	Swedbio
Katie Bolt	UNEP-World Conservation Monitoring Centre
Jean Baptiste Eken	Action pour le Développement
Lydia Richardson	Tripleline Consulting

