



Metrics and Measurements: Time to Turn Evaluation on its Head

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In funding rights-based social change, monitoring and evaluation (M&E) processes are essential to tracking the quality, impact, and progress of grantmaking against a grantmaker's mission and strategic action plans. M&E processes offer an opportunity to slow down, appreciate those efforts that have thrived and note those that need to be reassessed. At the same time, it is important for conscientious grantmakers to be aware that many M&E techniques often reinforce power imbalances between funders and grantees. Furthermore, M&E indicators frequently rely on metrics that do not take into account contextual details and complex processes related to tackling deeply-ingrained problems at the community level. These indicators can also feel foreign to local cultures and traditions of learning. As a result, many community-based organizations (CBOs) continue to face undesirable experiences with evaluation processes.



Photo Credit: IDEX

To address these issues, International Development Exchange (IDEX) – an organization that supports grassroots and community-led organizations – chose to “buck the trend” and use monitoring and evaluation as a learning and accountability exercise, and not as a test for performance.

IDEX's Partnership Model

Informing IDEX's learning approach to M&E is our “partnership model” – a set of grantmaking practices and supporting activities that are based on human rights values and democratic principles. The ultimate goal is advancing and achieving broad-based social change. This model has been honed over the last dozen years with valuable input and advice from grantee partners. Through this model, IDEX promotes, by way of reflection and practice, respect, transparency, and humility in the funder-partner interaction. We also try to remain mindful of the power differentials that can serve as a barrier to building genuine relationships based on trust between grantors and grantees. These principles represent the building blocks of an authentic relationship that adds value to a potentially transactional association between a funder and its grantees.

Asking grantee partners to evaluate us as a “funder”

IDEX has strong monitoring mechanisms in place, developed over time with extensive partner input, regular feedback and data collection, reporting, and information sharing. Yet, we wanted to hear directly from our grassroots partners, who are expert practitioners, about our partnership approach. Is it still relevant and effective? How could IDEX improve the way it supports grassroots partners and the excluded communities they serve?

To reflect and learn, it was important for grantee partners to be able to speak frankly and in confidence with a third party evaluator. Questions the evaluator asked included: What do grantee partners think of IDEX's partnership approach, systems, and relationship-building techniques? How deeply does IDEX implement its values within its processes and practices?

The consultant picked a theory of change-based method as the most suitable to assess assumptions and impact. This method helps grantmakers articulate, test, and measure their rationale behind funding certain solutions to human rights and social change problems. A theory of change-based approach is also useful when an organization's work addresses the root causes of inequity and injustice, and for testing the power dynamics inherent within the grantmaking relationship.

Listening to partners' feedback

The evaluation process consisted of an easily accessible online survey completed by 16 grantee partners in 6 countries (an 84% response rate), and 8 in-depth interviews. The result was a treasure of rich and informative data, which formed an excellent learning resource for IDEX.

Grantee partners strongly endorsed IDEX's model of authentic partnership (82% of respondents find the model to be very or mostly effective). They also supported the values that IDEX embodies and personifies: staff received high marks for embodying IDEX values including respect, flexibility, responsiveness and integrity when interacting with partners.

IDEX is using the evaluation results and recommendations as part of an ongoing process for improving our programming. Specifically, we are utilizing the results to refine the change model that guides our overall vision and grantmaking objectives, strengthen our partnership model, and tweak our internal systems and processes. We are carefully parsing and addressing recommendations such as supporting more peer learning exchanges, brokering additional resources and holding partners more strictly accountable for stated goals, while responding to calls to grow IDEX's resource base.

Core support goes the distance

Notably, data from the evaluation also confirmed to IDEX that long-term flexible grants, which can be used for core operating support, make lasting differences in the lives of many organizations. The data revealed that, with core support grants:

- 88% of IDEX's partners have been able to develop local, community-based solutions to solve human rights problems either "totally" or "to a great extent";
- 75% met all or more than half of their goals to address local needs; and
- 75% identify a significant, positive change in community members' leadership.

Grantee partners also confirmed the importance of funders supporting alliance-building and forming linkages to other social change organizations and movements locally, regionally, and internationally.

Making room to further the discussion

By asking our grantee partners to evaluate us, IDEX has demonstrated that it is possible for funders to root their support in understanding the nature, context, and challenges of their partners' work. As a result, funders can build and sustain good practices, engage in shifting power dynamics, and more effectively empower community groups and individuals to step into their roles as leaders and game-changers who foster broad-based change.

Additional Resources:

- IDEX's 2012 Evaluation and Learning Report: <http://www.idex.org/what-we-do/impact-full-pdf.php>
- Srilatha Batliwala, Strengthening Monitoring And Evaluation for Women's Rights: Thirteen Insights For Women's Organizations, 2011: <http://www.awid.org/Library/Strengthening-Monitoring-and-Evaluation-for-Women-s-Rights-Thirteen-Insights-for-Women-s-Organizations>
- Evaluation to Support Strategic Learning: Principles and Practices, Center for Evaluation Innovation, 2011: <http://www.evaluationinnovation.org/publications/evaluation-support-strategic-learning-principles-and-practices>
- Four Essentials for Evaluation, Grantmakers for Effective Organizations (GEO), 2012: www.geofunders.org/publications/four-essentials

To learn more about IDEX's approach to Monitoring & Evaluation, contact Yeshica Weerasekera, Director, Program Partnerships, International Development Exchange (IDEX) at yeshica@idex.org.