



PIM Booklet 1: Group-based impact monitoring

by Dorsi Germann and Eberhard Gohl

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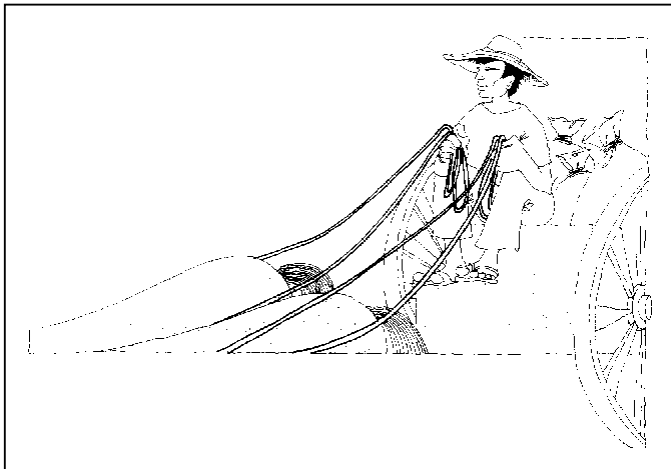
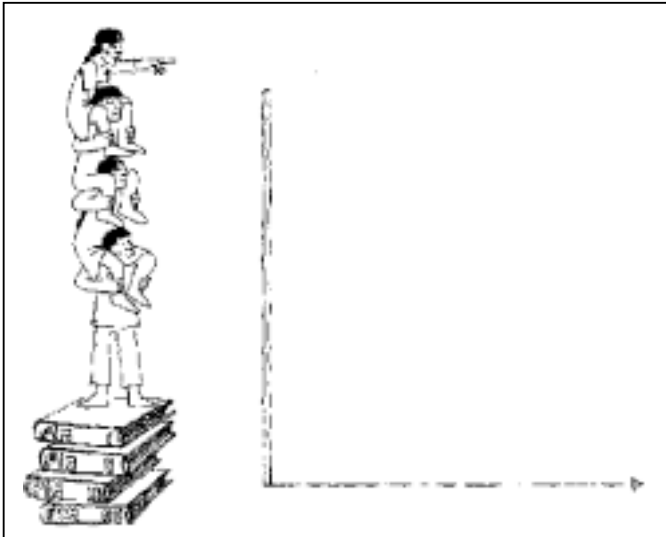
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- help satisfy basic needs,
- make efficient and environmentally sound use of locally available resources,
- mobilize existing skills and promote self-help,
- extend user's scope for action and promote independent action.

ISAT offers its services (question-and-answer service, various types of publications and films) to German development co-operation organizations as well as organizations and individuals in developing countries. Requests for literature and documentation on specific areas of appropriate technology can be addressed to ISAT.

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Do you need a new tool to manage your project?

Thank you for your interest in Participatory Impact Monitoring. Just call it "PIM" it's much easier!

PIM is designed for self-help projects. If people have set up an independent organization of their own to improve their living conditions in some way, they have a self-help project. Normally, a group has leaders. Apart from them, various other members of the community may have specific responsibilities. Are you a leader or a member of a people's organization of this kind? You may call it a "self-help initiative" or a "grassroots organization". We call it a self-help group or simply a group. If a group is carrying out a bundle of activities to solve a specific problem in its environment, we call this a project. Are you starting a new activity or a "project"?

Your group also has rules, which specify how the leaders and ordinary members of the group share their responsibilities. Usually, these rules evolve from practice. Do you feel that the rules of your group need to be developed further - perhaps because a new task has been set?

YES? Then perhaps you'll be interested in Group-Based Impact Monitoring. The purpose of PIM is to help make your self-help organization more successful by gearing your project activities to your members' needs, involving the members in observation (watching), reflection (deliberation) and decision making, strengthening your organization's structures.

PIM is not a magic solution that automatically works miracles! In fact it only works if certain conditions are fulfilled. Please consider for a moment whether these conditions are fulfilled in your group:

- Regular group meetings (e.g. once a month) should be normal.
- Your members should have a certain interest and some practice in participating in group decisions.
- The leadership should be willing to consult with the members before taking decisions.
- Your group should be willing to invest a little time - probably more than before - in joint management.

Many self-help groups are supported by a development organization, a governmental assistance organization, or an NGO, as we call it here. If an NGO supports your project, further conditions have to be fulfilled:

- There should be mutual trust and a mutual desire to manage the project by Participatory Impact Monitoring.
- Other actors involved should be willing to accept changes in the project, i.e. to adapt their contributions to your groups' needs.
- The facilitators should restrict themselves to methodological support; group decisions must be done by the group itself.

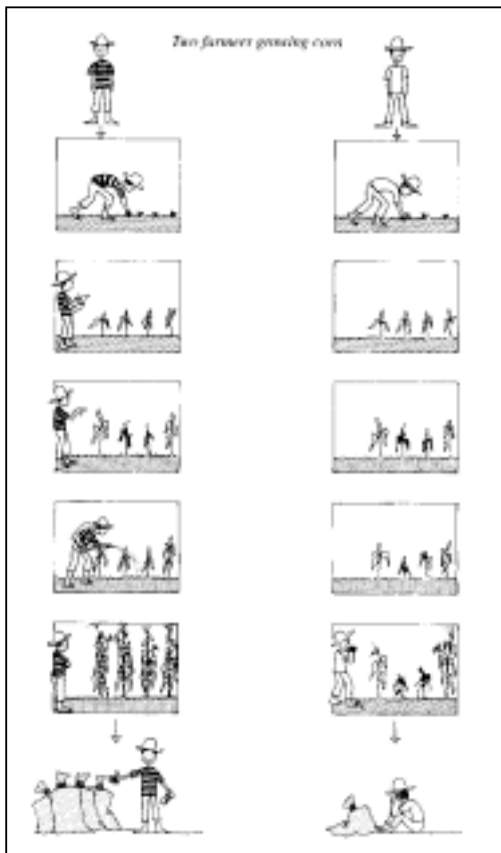
The NGO should then back up your Group-Based Impact Monitoring, preferably through a facilitator who should help your group to take its own decisions. The organization can also do this by applying the other string of PIM, which is known as NGO-Based Impact Monitoring. As you will see on the back cover page, PIM has two independent monitoring systems which are interlinked regularly to ensure that the NGO really is supporting what the group wants.

1. What does monitoring mean?

Let's start with an example:
Two farmers growing corn

Farmer 1 regularly checks the plants growing in his fields. When he notices that some plants are diseased and are becoming stunted, he immediately treats them with a (biological!) remedy. His harvest is good and he is satisfied.

Farmer 2 does not look at his field while the crop is growing. At harvest time he is shocked when he realizes that most of the crop is lost. He is disappointed.



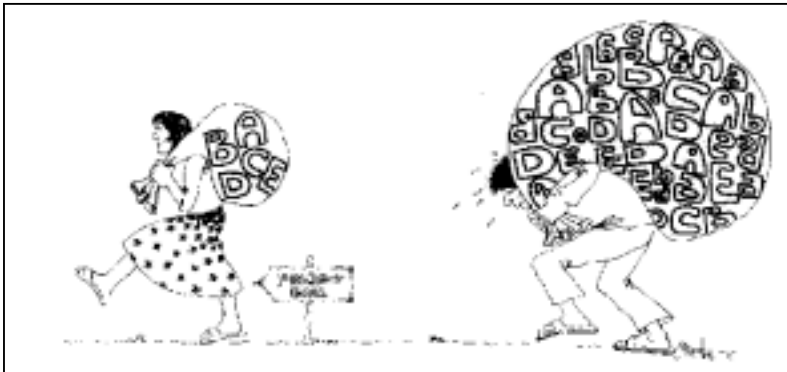
Two farmer corn

Monitoring means continuous observation, reflection and correction of activities. This is done by Farmer 1 but not by Farmer 2.

How difficult is monitoring?

Monitoring is really a very ordinary activity. After all, everybody watches and thinks about things or events that are important to them: children growing, the weather, the prices of agricultural produce, the behaviour of extension officers. The people concerned usually observe better than outsiders. But sometimes an outsider's point of view may be useful.

Monitoring is easy if people themselves observe what concerns them. Monitoring can be learned: we may have to sharpen our perception, we may have to improve our choice of examples (= indicators) or the way we measure observed changes to get a better picture of what is happening.

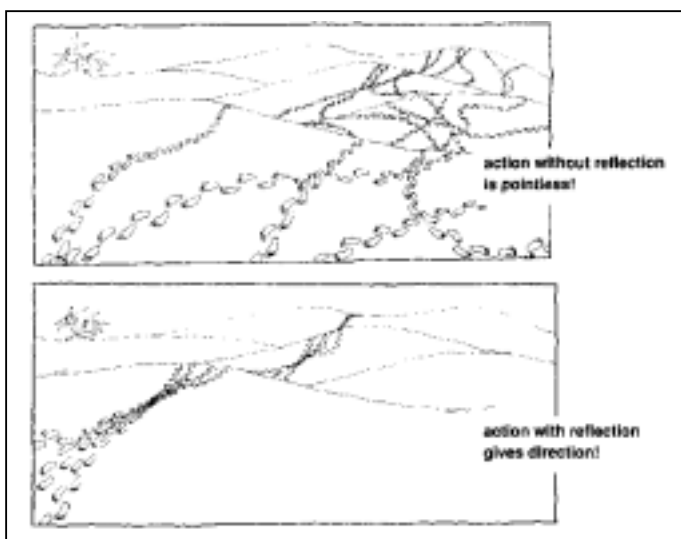


How much information do we need ? One common mistake is trying to collect too much information.

In an organization or a group, however, the activities are more complex. Observation is not more difficult, but often nobody feels responsible for monitoring. So certain rules have to be introduced for the "monitoring game". This booklet on Group-Based Impact Monitoring suggests some monitoring rules for your group.

In many projects it is helpful to introduce a monitoring system, especially if there are many tasks to be completed or different actors who need information about what is going on in a big organization. It is also useful if previous observation and reflection methods have failed or have been unsatisfactory, and a more systematic or formalized approach seems necessary.

Don't forget: monitoring takes time! Out of every 10 hours of work you will have to set aside about one hour for reflection (i.e. for observing and analyzing the situation, discussions with other members of the group, making up your mind, taking group decisions, planning, budgeting, coordinating, taking notes, keeping records); otherwise you will drown in work and there will be no time left for thinking! Is it impossible?



Bear in mind that

What should be monitored?

Some people who know development projects consider it important to monitor how far the plans are fulfilled. That is generally correct, because it is important for everybody to stick to their duties as agreed.

But in many cases the written plans do not reflect what people really want. There can be many reasons for this:

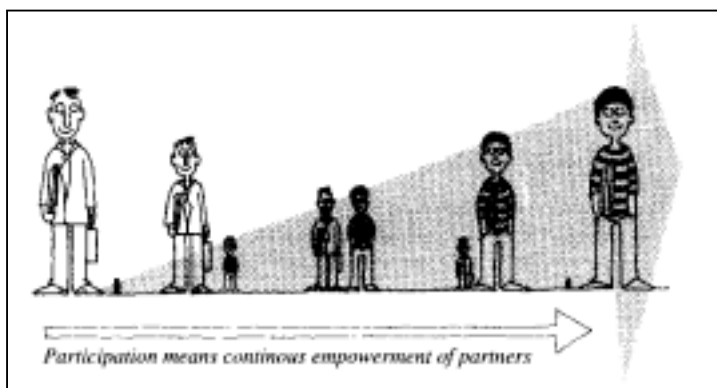
- The self-help group and the social context are not taken into account early enough in the planning, or not to a sufficient extent.
- Only after the project and the activities get under way do people get a clear idea of what they want and how they can articulate this.
- The information basis for planning is not good enough and the working plans are incomplete.
- The general context and the internal situation of the organizations involved are changing rapidly.
- Mistakes are recognized and corrected too late.

This is why PIM asks about the informal objectives of the actors involved ("expectations and fears") and the effects that were not planned ("What has changed?"). This is detailed in the next chapter, where we describe the steps in monitoring.

Your group should systematically monitor the changes that are important for them! The findings will depend on who is doing the observing, because everybody sees different things and attaches different levels of importance to what s/he sees. For example, a monitoring system set up by a development organization would set other priorities; and monitoring by a funding agency would be different again. But each organization involved is autonomous in its project management.

How is it done?

"Participation" is a wonderful-sounding word which is notoriously likely to be misunderstood. In the present context, "participation" not only means "to take part in a joint activity"; through participation, the different experience and capabilities and the knowledge of all those involved can be exploited. In self-help promotion, participation means even more: there should be a continuous empowerment of people's groups going hand in hand with a continuous relinquishment of power by development organizations and funding agencies. Participation also implies an empowerment of the members of the self-help group, and even of the development organizations or NGO vis-à-vis the funding agencies.



Participation means continuous empowerment of partners

Learning processes and capacity-building are not feasible without action. We are "learning by doing", and this again means learning by trial and error. It may be helpful for all actors involved to know that:

Participatory monitoring should help those involved to learn to draw conclusions for decision-making out of this trial-and-error process and guide the activities according to "lessons learned".

In PIM, participation has one more meaning. We stated above that the various actors each have their "own" project managements. The most important actor is the self-help group and their experiences must be preserved. In the case of a joint project these different experiences and monitoring systems must be linked. There should be an exchange of information and joint reflection - this is the basis of participatory monitoring.

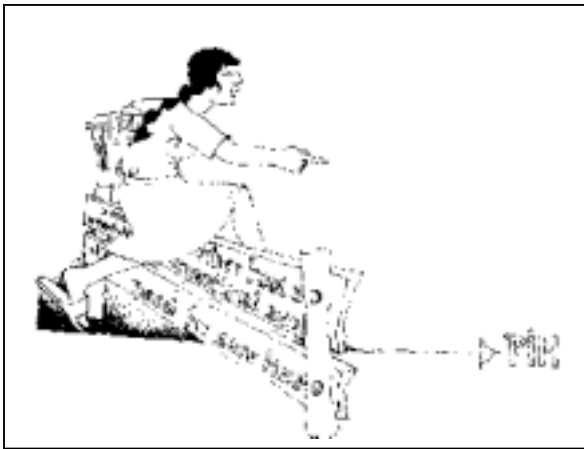
So is PIM always participatory? No management tool can be participatory in itself- not even participatory monitoring is participatory per se. The utilization of a tool is an art, and requires certain special attitudes:

2. Steps in introducing and carrying out Group-based

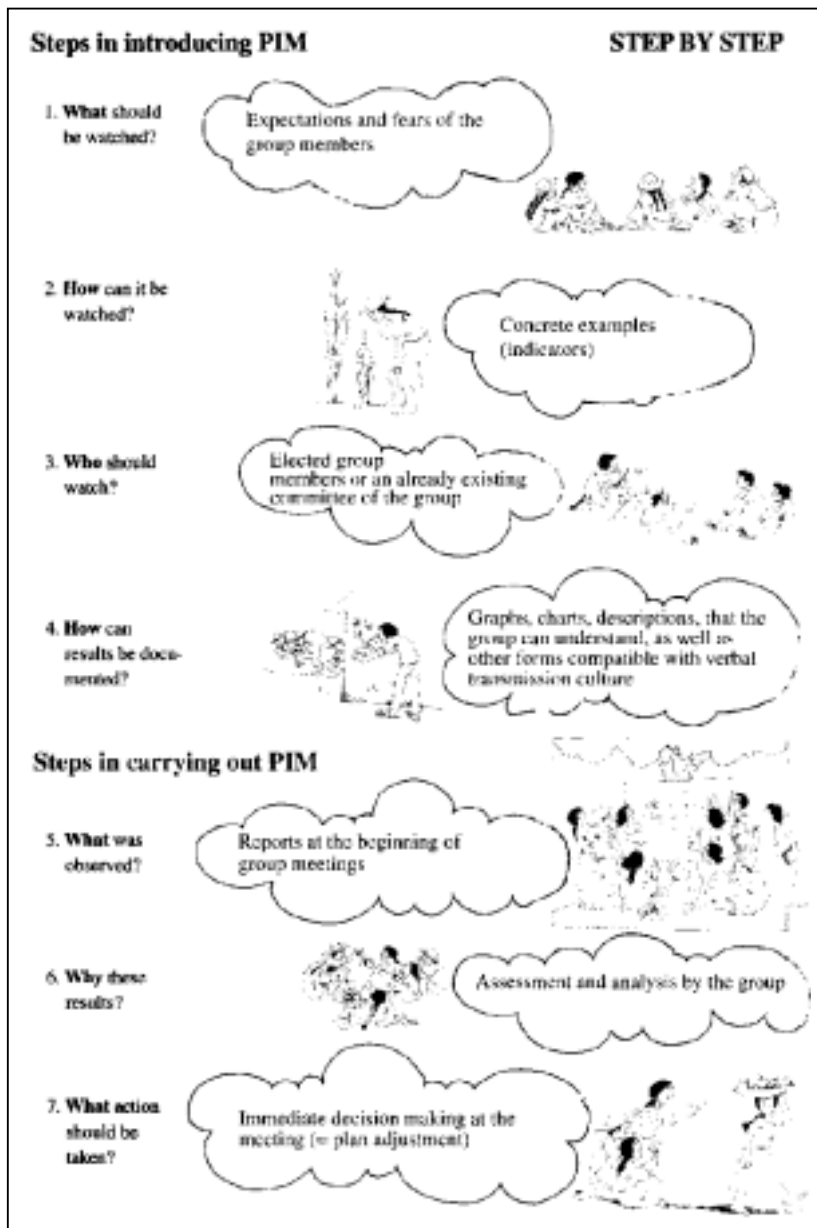
Impact Monitoring

As we have seen above, PIM holds out the promise of being useful - but certain conditions must be fulfilled. PIM is an appropriate tool for managing a self-help project - but do you really want to try a new monitoring concept?

PIM may take more time - but do your group members want to spend more time on joint decisions? PIM is intended to empower people who have no voice - but will the people in power at the moment accept a loss of influence?



Is your organization strong enough to tackle this new task? Are the leaders and members willing to face the hurdles mentioned above? If so, it is very likely that you will be rewarded with fruitful growth of your activities!



Preliminary step: What is known about the context?

If your group prepares a joint project with other groups or organizations, you should be aware of the context:

What does the group know about the problems you want to resolve?
 (= situation analysis)

Before starting new group activities, the members of your group should have time and an opportunity to think about their own situation: the problems you want to tackle, as well as your strengths, your weaknesses, your opportunities and the hazards.

- What does the group know about the other actors associated with the project?
(= participant analysis)

You should also look at other organizations and people associated with your project. Do they have similar problems, similar interests, similar ideas ...? You may want to make a list: who would be affected by the project, and who could take over some of the tasks? What are the various individuals' main responsibilities? What are their strengths and weaknesses? What role could each actor play?

What do the partner organizations involved know about you?

External organizations used to have their own monitoring systems. However, your group should regard group-based impact monitoring as your own independent monitoring system.

If your group already has a good management and decision-making structure, whether formal or informal, you should explain this structure to the external organizations involved. Otherwise they may think your organization has no rules. If your rules work well they will be respected and there is no need to change them; on the contrary, the external organizations should profit from your experience! On the other hand you may want to improve them in which case dialogue with your partner organization could be fruitful.

Step 1: What should be watched?



When new project activities start, one of the regular group meetings should be set aside to identify the expectations and fears of the group members. At the meeting a simple collection of ideas can be made on what people expect from the project and what reservations they have about it.

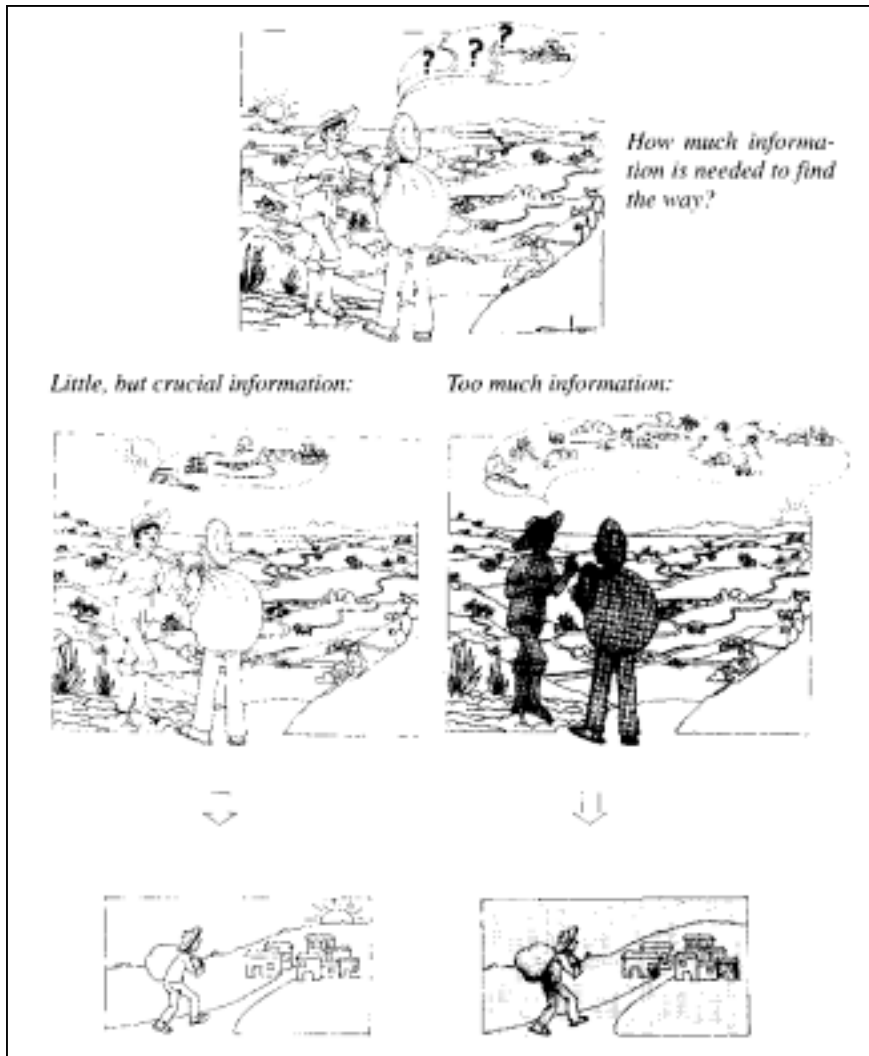
What changes do we expect from the project? (What do we hope to achieve?) What changes do we fear from the project? (What do we want to avoid?)

There will be various expectations and fears. In the case of the shop that was to be run by housewives' committees in Caracoles, Bolivia, the following concrete examples were given:

EXPECTATIONS	FEARS/DOUBTS
that the nutrition of the cooperative's members would be improved	the consumption of highly nutritive food products has increased
that basic foods would be available at fair prices	that cooperative members would not pay their debts
that housewives would participate actively	that they would not be able to run the shop and would go bankrupt
that the housewives would learn how to run a shop	that they knew nothing at all about administrative procedures

Out of these expectations and fears the group selects those which are most relevant, for example by prioritizing. About three expectations/fears may be sufficient. The expectations and fears thus chosen form the object of observation in group-based impact monitoring.

The list of things to be watched should not be too long. Generally, a few things (perhaps even just one?) which can be analyzed cooperatively are clearer than a long list of complex facts which nobody can memorize or process. The following picture illustrates how complicated and time-consuming an excess of information can be.

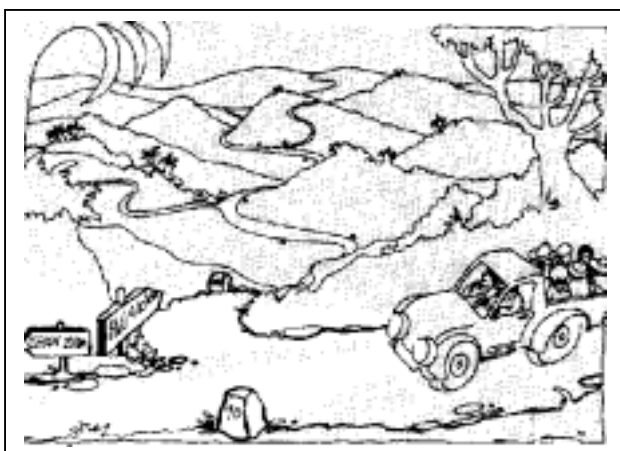


Step 2: How is it done?

After having chosen some expectations or fears, you should ask for concrete examples of how you can see if things change the way you want or not. You are looking for indicators.



EXPECTATIONS/FEARS	INDICATORS
that the nutrition of the cooperatives members would be improved	the consumption of highly nutritive food products has increased
that basic foods would be available at fair price	prices have been linked to market prices
that housewives would participate actively	housewives committees have been informed about the administration of the shop at each meeting
that it would not be supervised by the housewives committee	
that cooperative members would not pay their debts	a register is being kept of names of cooperative members who have not paid their debts



Indicators are like markers

Indicators are rather like roadside markers: they show whether you are still on course and what progress you have made.

Generally, it should not be too difficult for your group to provide some good examples and thus to define the indicators during the meeting itself. The group members not only know their world in detail, they often have their own indicators for assessing changes relevant to them.

Concrete examples of the expectations and fears may also be identified with the help of a facilitator, if you need assistance.

PIM does not require scientific solutions; it asks for practical solutions for self-help groups and small development organizations/NGO. Continuous reflection is more important than meticulous gathering of data.



Four ways to create indicators

1. Measuring or counting: gives us exact numbers example: the prices of the goods are measured: \$ 0.45 per kg; the quantity is counted: 20 pairs of shoes
2. Scaling or rating: gives us a gradual description example: the quality of the goods can be scaled: very good --- good --- average --- bad --- very bad
3. Classifying: informs about non-gradual categories example: Is salt available: yes / no ? Who takes the final decisions in the shop: women /men ?

Describing qualitatively: describes in words only example: How is the shop administered? The answer describes one or more aspects in words. The description may have a certain structure: (positive - negative aspects; leadership - purchases sales - book-keeping)

Where can the information be found?

We should determine beforehand where and how we find the information for the indicators we have chosen. Collecting data takes time and costs money. Information from our own sources is more authentic and may initiate more discussions. In PIM, we basically trust in the knowledge of group members themselves. It takes less time to obtain outside information but it may not be so relevant. If outside information is used the source should be quoted.

INDICATORS	OBSERVATION METHODS
(derived from expectations or fears)	
the consumption of highly nutritive food products has increased.	measure the weight of each product sold (lentils, quinoa, corn
- higher consumption of lentils and quinoa	flour, dried field beans, noodles, rice and sugar) separately, and re
- lower consumption of noodles, rice and sugar prices have been linked to market prices by agreement with the three cooperatives	cord it appropriately reply YES or NO and record observations and comments
women have been informed monthly about the administration of the shop at each Housewives' Committee meeting a record is being kept of the names of cooperative members who have not paid their debts	reply YES or NO and record observations and comments keep the record in the form of a table, with a separate table for each cooperative

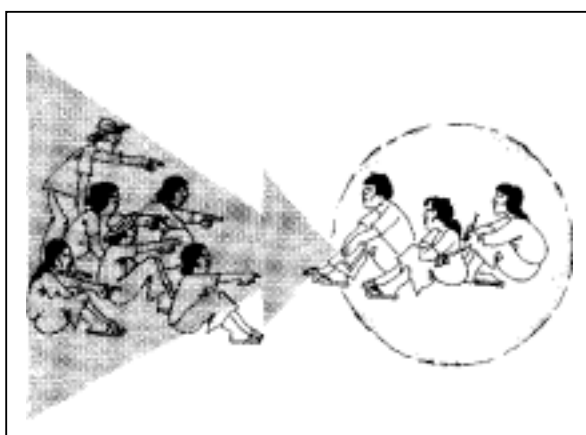
Step 3: Who should watch?

The people responsible for watching these indicators should be chosen at the meeting. The group could nominate individual observers or an "observation team" or "committee". These people should have a specific function within the organization, to avoid duplicating structures.

By assuming the role of observers, members of the group learn to watch for relevant changes and to assume responsibility.

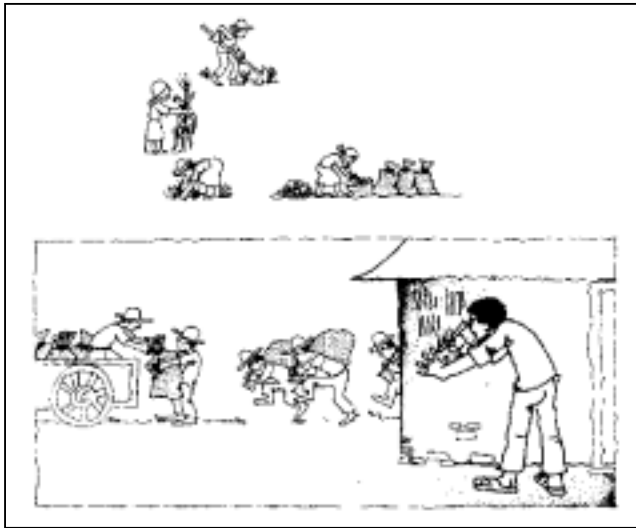
Even two or more observation teams might be useful if different social groups perceive the project differently or benefit from it in different ways (e.g. women/men, the younger/older generations).

If the task at first seems too difficult for the group, the NGO's field staff may be asked for assistance. Or someone from the community might assist, for example elders, informal leaders, former leaders, teachers, etc.



Step 4: How can results be documented?

- It makes your data more accurate.
- It serves as a reminder.
- It makes the data accessible for other people.



The following graph demonstrates how keeping records can be helpful and useful:

- Three observers (on the next picture on the left) watch fruit being sold at a village market, but without taking notes; at the end of the day they cannot agree on how much was really bought and sold; consequently they cannot take a decision regarding an appropriate means of transport.
- Two observers note down immediately what they have seen; at the end of the day their results are very similar, so it is easy for them to decide which method of transporting their fruit is the most appropriate.

You can use exercise books, for example, to write down what you observe. If you are watching specific indicators for a prolonged period of time, it helps to use special forms for greater clarity.

To ensure that the information reaches all members of the group, the observation team should try to record what is observed in an expressive, clear and easily understandable way. All kinds of charts and graphs can be used. Observers and group members may first have to be familiarized with these. The development organization can provide the necessary support.

How challenging an observer's job is

"At the first meetings PIM was something unfamiliar, to which they had to devote several hours outside the meeting. Later on, PIM became an established item on the agenda of the general assembly. The members of the cooperative participated willingly, because with up-to-date information they were beginning to gain a deeper understanding of the cooperative's problems. They also began to be aware of the credit, thanks to a chart which illustrated graphically the amount they owed and made it clear that the debt increased month by month due to the interest. This provoked uncertainty and concern amongst them. "

"In the first phase, 14 indicators were worked out, of which eight were prioritized: these reflect the problems of the shop. The PIM observer's committee worked with them continuously. When the indicators had been selected, the method of watching each one was defined. The form of documentation to be used was also laid down, i.e. tables, graphs, and questions to be answered. All this was done with the participation of the three housewives' committees and some members of the cooperative. "

"In the following months there were monthly meetings. In the first two months, a failure to

understand the indicators and mistakes in dealing with them were noticed. The housewives responsible for watching the indicators made a big effort and found ways and means of obtaining the information and filling in the indicator forms. (One woman, for example, sent her husband to the cooperative to obtain information!)"

"In the following months, thanks to the indicators, a gradual improvement in the running of the shop was noted. "

Case: Caracoles, FEDECOMIN, Bolivia

"Not measuring more accurately than needed, and not trying to measure what does not need to be measured. We are trained to make absolute measurements, but often trends are all that are required. "

Case: SIBAT, Phillipines (for further case studies see Booklet 3)

Which information and for whom? When and how?

What should be done with the information? Not everyone needs all of it. Information from inside the group does not necessarily have to be given to outsiders, to development organizations (NGO etc.), funding agencies, or other external actors (government authorities, intermediaries etc.). You should agree within your group, and with your (external) partners as well, what information is to be kept inside or channelled outside, and how often.



The group probably needs frequent reports. These can be presented at the regular meetings.

Not all information is required monthly; some is needed less often.

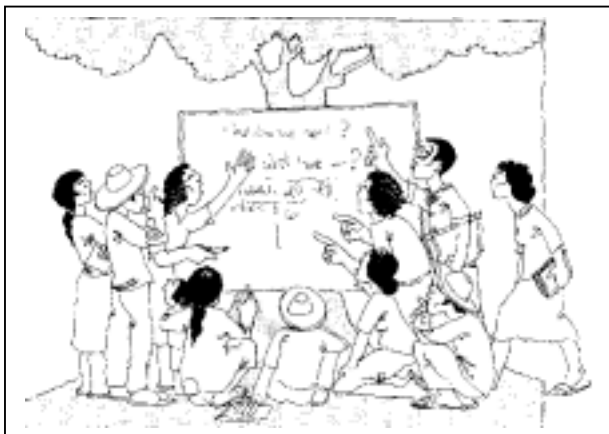
If your group has agreed on an information flow with external partners, this exchange need not be frequent. The further away the other actors (NGO, funding agency) are, the lower the intensity of reporting will be. In the long run, they may require information only at quarterly or annual "joint reflection workshops" (see NGO-Based Impact Monitoring).

So far, we have focused on setting up the group's monitoring system. Now we shall see how regular group-based impact monitoring can work.

Step 5: What was:observed?

The members of the monitoring team have now started to keep a watch and document the

indicators. At the beginning of a group meeting they should report their findings, i.e. the relevant changes within and around the group. This can be backed up by informing the entire group beforehand, with posters or other public information.



If there are a large number of indicators, the purpose of the meeting should be taken into account and the indicators chosen accordingly.

Following this presentation the members of the group may be asked if any other unintended and unexpected changes have occurred. Asking questions may result in other relevant changes being identified which are unrelated to the expectations and fears mentioned above. (If there is an external facilitator this step will be easier.)

Step 6: Why these results?

The results should be briefly discussed and analyzed. If the indicators only require YES or NO as an answer, it is useful to ask for further findings ("Why is it yes or no?") and to give details.



Indicator 2: Were the prices linked to market prices, in agreement with the three cooperatives? (yes/no)
 Answer: YES
 Observations: Prices were adjusted according to the increase in market prices, including an amount for transport and travel expenses. The housewives from cooperative N. did not attend this meeting.

It is probably not advisable to start a discussion on each finding immediately, because on many details there will be no consensus. A discussion should only be started if there is a need to take decisions, to act or respond to a change or to persistent problems. If the results are felt to be "normal" there is no need to discuss them. However, if they deviate from what was expected it may be necessary to give the matter some thought and take a decision.

"Traffic lights" to indicate the need for decisions

Example: The supply of goods is expected to be regular; observations could be:

goods are normally available:	green: no additional action
necessary an item was out of stock for 7 days:	amber: corrective action by stock keeper necessary
an item was out of stock for 30 days:	red: special meeting and decision required

The indicators make the findings fairly easy for other members of the group to check, but they will not always be accepted without any doubt. If there is any disagreement it may be important to point out that change in the community can be (and usually is) perceived in different ways.

Generally, the results of observation require analysis above all in the following cases:

If things are always as expected, this is probably a success and it is worthwhile analyzing occasionally why and how these results have been achieved.

If the monitoring results show that there are problems which require decisions, the meeting should put the topic on its agenda immediately.

The findings can then be analyzed on the basis of the monitoring reports, either at the same meeting or at one of the next meetings. It is important to discuss the consequences and causes of the changes noted and their relevance to the future activities of individuals and of the group.

It is important to ask:

- What has been (can be) influenced by ourselves (the group) ? - What has been (can be) influenced by the development organization ?
- What has been (can be) influenced by others ?

If the changes are regarded as good, this will give you the self-confidence to demonstrate that your personal and collective activities have been significant and successful. If the changes are regarded as bad, your group should look for possible ways of influencing them positively, either by taking action itself or by urging others to do so.

There is a certain risk of becoming embroiled in pointless discussions at this stage of data assessment and analysis. To avoid wasting time and effort, a facilitator should try to structure the debate and to keep it action-oriented.



Step 7: What action should be taken?

The impact analysis has raised the question "what can we influence?". The group should take decisions accordingly. If possible, you should decide immediately, at the meeting, what initial action should be taken. This shows how PIM makes sense. Using PIM in practice, it has been found that decisions are best taken immediately after discussing the indicators.

"Since all of the activities are geared to enabling members of the group to bring about changes in the community, provision must be made for allowing them to state where, in their view, fresh action is needed and what should be done to complete it.

There could even be a situation where the measures taken by each member would suffice and no further action would be needed. "

Case: SIBAT, Philippines

A plan of action should at least contain the following questions:

- What action needs to be taken? Cooperative treasurer should be persuaded to deduct debts from payments to cooperative members and pay them directly to the shop.
- Who is responsible for taking it? Anna.
- Who else is involved? Berta and Clara talk with Cooperative's President.
- When should it be done by? 30 April.

Documenting decisions

As a general rule, all decisions taken at group meetings are recorded in the minutes. The findings of the monitoring committees and/or observation teams and the changes as perceived by the rest of the group should also be documented. Comparison of indicators over a longer time-span will be a valuable aid to evaluation in the future. It is important to ensure that the lessons learned in the project are not lost.



These results are usually documented in the group's books or files. However, the sharing of information among all members of the group is part and parcel of PIM. Documentation should therefore be publicly accessible, ideally in the form of posters and small publications.

What should be changed in the monitoring system?

After a certain time you may need to adjust your monitoring system. There can be many reasons for this:

- If you notice that the indicators you chose first are not very helpful, you should look for other (or additional) indicators, in the light of your experience so far.
- In the course of time new expectations and fears may arise. More attention may be given to previously neglected changes in the group's environment. A routine will become established, of observing changes, analyzing cause-and-effect relationships, and taking decisions based on monitoring results. This will lead to improvements in the impact monitoring system.
- Development organizations and funding agencies will feel a certain need for improved information flow. They will appreciate autonomous group-based monitoring and they will support it. However, at the same time they may ask for more information from the group. The group must decide, but also negotiate with the external organizations, how (and which portions of) its information should flow outside, and through which channels.

In the long run, a self-confident group may take the interests of the development organization and funding agency into account and include them in group-based impact monitoring. If compromises are possible, group-based impact monitoring may even replace most external monitoring.

Case studies

To help readers understand the context of the quotations in the text, the five case studies on which this PIM booklet is based are briefly outlined below.

Case: SIBAT, Philippines
Community of Bacgong, Philippines

The Agricultural Production Project was initiated by PARTNERS (an NGO member of the SIBAT network). Its aim is to support and sustain socio-economic development initiatives in villages, one of which is Bacgong. The self-help group of this village comprises three sectors: farmers, women farmers and youth.

The project was conceived by these groups and PARTNERS to meet the villages' most basic need for food. The project has two major components: 1) organization and education, and 2) agricultural production, comprising rice, vegetable and livestock production mainly for home consumption.

Case: Kantuta, FEDECOMIN, Bolivia
Ore Dressing Investment Project, Kantuta Mining Cooperative, Bolivia

FEDECOMIN is the Mining Cooperative Federation of La Paz, with 76 member cooperatives. FEDECOMIN has its own advisory service, i.e. CODECOMIN.

The mining cooperatives are a genuine form of self-help, but the miners' families are very poor. The Kantuta Mining Cooperative has invested thousands of dollars in its ore dressing operation, but it has management problems and is being hampered by delayed approval of the credit.

Case: Caracoles, FEDECOMIN, Bolivia
Housewives' Store, Cooperative Sector of Caracoles, Bolivia
(Mining Cooperatives of Libertad, Porvenir, El Nevado)

The Cooperative Sector of Caracoles consists of three mining cooperatives: Libertad, Porvenir and El Nevado. In each one the women (who are generally not members of the cooperative) have formed housewives' committees. With the support of FEDECOMIN, the three housewives' committees have established a "People's Consumption Store" in order to improve the supply of everyday goods to these remote mines and to strengthen the women's position. But the store does not work very well.

Case: PWDS, India
Community-based Candy Making, Tamil Nadu, India

Palmyrah Workers Development Society (PWDS) promotes the socio-economic development of the palmyrah tappers and other weak groups in the community.

Normally, tappers sell the raw product to merchants or the women process it in their homes. This involves a lot of work, but generates little income. In the Candy

Production Units, the tapper families have started joint production of high-quality candy.

Case: INDES, Argentina
Rural Women's Group "Unión y Progreso", Misiones, Argentina

INDES is an NGO working in the province of Misiones with about 20 farmers' groups, two of which are women's groups. Within 5 years, Unión y Progreso's membership has increased from 25 to 83.

Its objective is to improve the families' living conditions. The main projects are vegetable gardens for family consumption, poultry production, training courses (health, nutrition) and a credit programme; the women hope to produce surpluses which they will be able to sell.

The two strings of PIM

Participatory Impact Monitoring (PIM) is a concept for guiding self-help projects in development cooperation. The actors involved carry out the monitoring themselves. Because PIM assumes that these actors are autonomous, it has several strands or "strings" - the monitoring systems of the selfhelp groups and the development organizations are separate. The strings are periodically compared: the actors reflect on their observations and assessments, adapt their planning accordingly and deepen their dialogue with one another.

PIM was developed as an alternative to conventional planning, monitoring and evaluation procedures. It does not presuppose the availability of good planning documents, nor does it postpone reflection to a late evaluation.

The main purpose of PIM is to document socio-cultural impacts. By doing so it initiates and reinforces learning processes, and complements more technically or economically oriented monitoring. At the same time, it is compatible with many other monitoring concepts.

PIM was designed in a joint study by workers in development cooperation from the Philippines, India, Bolivia, Argentina and Germany, and tested in 1993/94.