

MONITORING AND EVALUATION
IN LEARNING ORGANISATIONS

transparency of process



Annual Report
2005/2006

Mission Statement

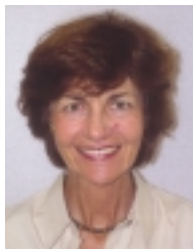
The Community Development Resource Association is a non-governmental African organisation advancing conscious and continuous learning about development processes and the art of intervention. We aim to help bring about and support authentic and coherent development practice amongst people, organisations and institutions working towards those forms of social transformation that most benefit the poor and marginalised.

We do this through organisational interventions, training, accompanied learning and collaborative explorations. Out of active reflection on our experience, and through writing and disseminating, we share our insights and lessons gained, seeking to impact on wider development thinking and processes. Our work strives towards a just and civil society; a society in which more people have access to resources and power over choices.

Our work is underpinned and informed by a commitment to enabling individuals, organisations and institutions to challenge socially restricting paradigms and practices. We strive to bring to birth new consciousness, creativity and strength in ourselves, and in those with whom we work, thus facilitating our collective development towards a more human, purposeful and conscious future. We are committed to accompanying these individuals, organisations and institutions through their crises of growth and development towards healthy interdependence.



Chairperson's introduction



The CDRA has yet again made the theme of its annual report enticing! Planning, monitoring and evaluation are inherent to development. As our country follows a development path – and government today talks of being a developmental state – the measurement of ‘delivery’ is paramount in the minds of all. For NGOs ‘logframe’ has become part of everyday monitoring and evaluation language.

During the course of 2006, the CDRA is offering a course in developmental planning, monitoring and evaluation. Some of the writing in this Annual Report emanates from the search by course participants for an approach to planning, monitoring and evaluation that supports rather than obstructs developmental practice. Their writing and that of CDRA practitioners offers stimulating, thought-provoking, questioning and challenging thinking about the need for recognition of something way beyond logframes. Helpful explorations of complexity – in the social context, in relationship, in shifting awareness, often through making learning central to practice – are offered.

This Annual Report, like previous such publications, draws the reader into an engaging awareness of it being possible – and so necessary – to challenge dominant paradigms. It also helps us to situate an awareness of self in pursuit of accountability in practice. It emphasises that development practice does not require only skill, but is indeed an art.

It is a privilege to recommend this report to our readers. Our CDRA team and all who open themselves to exploration of their development issues and problems with us (from whom we learn so much) are to be commended for the enrichment they provide to the development discourse and the quest for developmental practice.

During the year our chairperson, Bishop Rubin Phillip was very ill. The Board missed his presence in the organisation, but is very pleased to report that he has fully recovered. Professor Pieter le Roux, a founder member of the CDRA did not stand for re-nomination as a director of the Board at the AGM. He remains a member of the Company, however. His commitment to CDRA is deeply appreciated, as is that of our Board members staff, and funders.

Di Oliver

Deputy Chairperson: CDRA Board of Directors



CONTENTS

1	Chairperson's introduction	14	A client – <i>Tanya Goldman</i>
2	End of the century – which is why wipers	16	A Board member – <i>Judith Mtsewu</i>
4	Monitoring and evaluation in learning organisations – transparency of process	20	Transparency of process – monitoring and evaluation in learning organisations – <i>Nomvula Dlamini</i>
5	Emptying and doubt – some raw thoughts about observation in practice – <i>Rubert van Blerk</i>	32	Courses for 2007
12	Engaging the eyes of others	34	Books and Resource Centre
13	A course participant – <i>Judith Smith Vialva</i>	36	What we did
		38	Who we are
		40	Detailed Expenditure Statement

End of the century – which is why wipers

'Let's leave pessimism for better times' – spray-painted on a wall in Bogota

1. _____

With windscreen wipers
(Unlike drive-belts
Or footwear, or chameleons' tongues)
Low adhesion is advised.

But for this end of century
Wipers should be given
Some additional stickiness
Some adhesive stubbornness to turn
Grand vision into rhythm
Light into rubber
Narrative into epigram

These being more useful inclinations, I think,
At this end of a bad millennium

2. _____

Some time after the revolution, Soviet libraries adopted
the Dewey Decimal System

With one rectification – the two hundreds: Religion

All the way from 201, 202, 214 (Theodicy), 216 (Good & Evil), 229
(Apocrypha & pseudo-epigraphs), down to 299 (Other religion) –
this great textual body of human wisdom, confusion,
folly and aspiration was reduced by the Soviets to a bald:

Dewey Decimal 200: Atheism

This was not (not by far) the worst sin of Stalinism

But it was its most typical

This should be remembered of the 20th century

3. _____

I decline to name my windscreen wipers
'Easy Come' and 'Easy Go',
I think of them, rather, as
'Quote' and 'Unquote'

Between them
Reality
Lies in parenthesis

4. _____

Clandestine communist cells were organised
Right inside the Nazi death camps
(Each one a parenthesis)

Cell members used cigarettes to bribe camp officials, to get messages
out, obtain medicine in,
or to win space to perform this or that other small task of
solidarity and survival

A condition for secret Party membership was the payment of a weekly sub
- one cigarette

Somehow to be stolen from the guards

How many militants were summarily executed?

How many were caught trying to meet the brave challenge of stealing the
week's levy?

This, too, should not be forgotten of our century

5. _____

I name my wipers:

'On the One Hand' and
'On the Other Hand'

6. _____

Those who lost the Cold War
Did not deserve to win in the end

Those who won the Cold War
Were (and are) entirely
Unworthy of their triumph

7. _____

I am very much worried, ma-comrades, I mean if we get
retrenched, or contracted out, or sent to i-casualised ward, is because why?

Soren-so says for economic growth we have to via global
competitiveness, by so saying

i-Management says, workers, the ball's in your court

We have given you, they say

A good package

(Which is almost the same phrase Kgalema had just used with irony, thirty
minutes before, as we waited for this very meeting with FAWU shop-
stewards)

(Which meeting eventually started two hours late)

(Which is why we'd been watching soccer on TV in a breakaway room, and I
was distractedly trying also to write a poem about the end of the century,
while Steve Lekoelea looped in a weak cross that was easily cut out by
Chief's defence)

And Kgalema said - 'No,

It was a good pass

Just to the wrong team'

And I thought: That's it!

That could be the poem about the end of the 20th century

8. _____

In the shadow of the big banks a stokvel

Home brew in the backyard

In a thump of rubber with the foot

To wake up your ancestors in a mine-compound

With a gumboot dance

For most of this century

People's cultures have retreated to the secret

Thaba Bosius of the soul

Forced to stratagems of non-hegemony -

Rhythm, syncretism, exhibition for the tourist, slant-wise to reality

But what went up to the high plateaux as wedding song, or hunting chant

Came down, sooner or later, transformed

In a factory choir, or toyi-toyi on the street

And is even now an incalculable resource to go, bravely

Slant-wise, into this next imperial century

9. _____

With all the ambivalence of a car in the city

Being of the street and

Not of it, just passing through

Down Tudhope, wipers at work, rubber-thump, rubber-thump, taking the bend

in the shadow of the tower blocks, then, where the next bend sweeps left

Just there

One day it's an inner city father walking his four-year-old kid to creche

One day a kerb-side telephone hawker ('Howzit?', 'No, grand') with her extension cord looping up to a jack in a third floor flat

One day it's a bucket with 'For Sale' (cooked sheep's trotters) 'Johnny Walkers', they're called

One day it's the crash-in-transit Toyota that I see first

Then the polaroid photographer, then the taxi-driver himself

Posing, door open, left elbow on bonnet, tossing away a cigarette butt (one week's sub?), for a snap-shot to be sent to someone, somewhere (rural?), no doubt, else

This tenderness, make-do, wit, role-reversal, job-pride, all in the midst of a crumbling, an urban, end of century something else

10. _____

The wisdom of windscreen wipers

Is velocity's blink

Hesitation in onward rush

An ironic side-swipe on the hypothetical freeway N1 North

In this end of millennium downpour

Where we've become habitual, edgy, typical, turned to a split-second *hi*

One of the genus: desperate whisk, squeegee, scull-oar, either/or

Wavering with intent

In this global, totalitarian, homogenised deluge, where parents, patients, dependants, lovers, learners, supporters, congregants, citizens (if we still exist) are zombified into one thing all - clients

And public (if *they* still exist) institutions are made, the leaner the meaner the

better, contractual service providers

Where managerialism is the ism to make all isms wasms, the new 200 Dewey

Decimal, the delirium of our age

Which is why wipers

With their cantilevered, elegant, frenetic, rubber-thump, rubber-thump

Activism want to insist

Clarity of vision

Forward progress

Proceeding wisely to the point

Involve

A certain

On the one hand

On the other hand

Prevarication

As into

Another millennium

With its own impending

Miscellany, theodicy, good & evil, apocrypha

You/We

Either way, now

Slant-wise

Ironically

Plunge

JEREMY CRONIN

This poem is from his collection entitled 'More Than a Casual Contact', Umuzi, Cape Town, 2006. Reprinted with kind permission.

Monitoring and evaluation in learning organisations – transparency of process

In the last few years we have observed, through our own experience and through that of our clients and colleagues, how monitoring and evaluation activities have come to occupy an increasingly prominent position in the management of and accounting for donor funds.

And monitoring tends to happen using received templates, tools and methodologies which invariably bear little reference to the particular work we are doing. Designed to smooth the passage of our donor's information management systems, these approaches to monitoring become more obligation which we fulfill. Wearily. Evaluation too is a necessary activity that must be performed if the money is to keep coming. We submit to the attentions of stranger experts, and do our very best to keep our true selves out of the picture. Evaluations are seen not as processes, but as production exercises, aimed at generating reports that, at best, are benign, and do little to disrupt the the order of things for anyone involved.

It is unsurprising that we have placed monitoring and evaluation in the department of bureaucratic duty. When we accept obligation without engaging and transforming it, passivity is sure to follow.

This Annual Report offers another view of monitoring and evaluation. We suggest that it really is possible to embrace these 'necessary' activities, turning them to the benefit of practice and impact. Donors' insistence on monitoring and evaluation is nothing less than a demand for transparency of process. This offers us the opportunity to provide such transparency, and in doing that, we become more transparent to ourselves, with increased accountability being a very welcome by-product.

The challenge, of course, is to monitor and evaluate in a way that is appropriate to the work we are doing and the change we are seeking to bring about. If we are seeking to bring about qualitative shifts in human experience and action; if we are seeking to facilitate healing and growth; if we are seeking to help others become more

able and more authoritative, then our approaches to keeping an eye on how we are doing and providing an account of how we have done must be congruent with these aims. If not, if we simply use other people's forms, instruments and experts – if we use technical measures for human processes – our attempts to monitor and evaluate our work will simply miss the point. They will not read the heart of the situation. They will only ever generate displacement activity on its periphery and information of dubious reliability.

Over the years we have made the case for learning as a central activity in organisations and individuals that seek to work developmentally. Developmental work is so focused on the particular, so responsive, so connected to the realities around it, that it can never be anything like an exact science. The only way to keep it relevant and alive, is to be learning from it, continuously. Without learning in practice, practice itself soon dies and becomes the dull implementation of pre-ordained actions.

In this Annual Report we suggest that monitoring and evaluation are integrally connected to learning. And that the demand that we monitor and evaluate may well be a gift, an opportunity to engage with and transform our own experience. If we embrace this obligation, and pursue it appropriately, we are in the best possible position to learn, and therefore to pursue thoughtful and purposeful work in the world. In the pages that follow, we share some approaches to monitoring and evaluation that seek to render developmental process transparent.

Rubert van Blerk's opening article offers a vivid account of a practice that is always monitoring, observing inwardly and outwardly, not as duty but as an integral part of the practice itself. A version of this article was shared during one of our Homeweeks, in which CDRA practitioners share and learn from practice. In this sense, both the experiences described within it and the article itself, are examples of monitoring done in a very particular way.

Emptying and doubt – some raw thoughts about observation in practice

Rubert van Blerk

During the Fellowship programme*, which has recently ended, I met with a small group of participants to present a case study. I had asked the group to read my account of an initial meeting I had with a prospective client where a request made for our services was explored. In this case field workers in the client organisation were being exposed to the trauma suffered by victims of poverty, causing them to experience severe distress. The request was for facilitation of a session where they could share thoughts and feelings related to their experiences and to look at ways in which the organisation could better support them. This account of my first encounter gave very vivid detail about what I had observed in the client as well as what I observed in myself i.e. my thinking and feelings at the time.

The Fellowship programme had from the outset engaged with view of the 'social' as a living process and that the practice of intervention involved more than just acquiring skills and methods, but the development of a form of consciousness, more holistic in orientation enabling greater accuracy in the 'reading' and appreciation of the complexity being encountered in the work. A key notion in this approach is an acceptance of our own participation (conscious and unconscious) in the phenomena (social context) that we have been called to engage with. This case study was one of many exercises to help participants engage with social phenomena in a challenging way in order to hone our developing practice. Our group process

was a simple one – the group members had to read the case study and then come back with comments and questions which would form the basis of a conversation.

The following is an extract from what they read:

It was a warm sunny afternoon with a strengthening south easter, a typical early summer day for Cape Town. After moving through the security gates, I was greeted by the receptionist in a large airy room in the centre of the building. Very neat and well maintained, I thought as I tried to busy myself looking at some photos displayed on a notice board situated above a cushioned bench. I was then received by the programme coordinator who introduced me to the director. I smiled in acknowledgement. Then the staff room at the back of the building, next to the kitchen. Large windows revealed an area where vehicles were parked shaded by a flourishing creeper and an outbuilding. Again a feeling of warm spaciousness. I was introduced to three other staff members. We sat down; I declined tea and asked for a glass of cold water. I hastily scribbled their names on my notepad to avoid forgetting, as my mind began to race, something that tends to happen at the delicate moment of meeting for the first time.

* A two-year professional formation programme that aims to support the establishment of a highly skilled body of development practitioners capable of working developmentally with complex situations in unfolding and unpredictable social circumstances.



With introductions over, the ball was now in my court. How would I begin? I gave an account of what I already knew out of the telephone conversation and the purpose of this meeting, really just to get to know each other and provide further opportunity to explore the issues, the questions people had and beginning to look at how I would be able to assist.

That out of the way, the conversation was now open. One spoke of how the people that they worked with offloaded their life experiences on them and how they felt overtaxed and burdened. Another about the need to 'draw the line', to have clear boundaries to safeguard yourself from the pain which characterised the lives of the community members they were supposed to help. There was an account of a potential beneficiary of the programme who had attempted suicide. I could not fail to notice the struggle to maintain composure as tears welled in her eyes on recounting the story of this young girl. Four times a year there would be field visits and they would come back to the office feeling weighed down. At times they had to be 'hard', this was difficult and it also formed a dynamic between them on the panel whose task was to decide which applicants would qualify as beneficiaries of the programme following a set of criteria. Often they would find themselves battling for their own group of applicants. Then someone reminded colleagues that the conversation was at risk of overshadowing the numerous successes which had to be celebrated as well. For some time already the organisation had acknowledged the need for some space so that individuals could debrief – it was fondly called a 'huddle' session. However this was quickly followed by getting back to work because there was so much to do, reports, admin and forward planning. And this had become a pattern out of which they were unable to break free. There was a realisation that change was necessary if they wanted to remain motivated and avoid burnout.

I meandered through this, trying to listen, at times losing the thread of the speaker in the midst of my own thoughts and reactions with mounting anxiety. And during my responding, I was talking too much I thought, at times breaking the momentum and flow of the conversation. What was my role here I thought, a counsellor reflecting feelings and showing empathy in response to the expression of pain or a development practitioner helping them to see themselves more clearly and unblocking hidden resources to move beyond the current impasse? The director raised the issue of practice. Yes!, I thought, an opening to steer this conversation towards this relevant issue, but why was it not me to bring it up in the first place? How was I doing my job, it was so obvious an issue?

I could sense that the meeting was coming to an end; someone had taken a glimpse at a wristwatch. It was agreed that there would be an intervention and a projected date. I would facilitate a staff reflection after completion of the November field trips. There would be sharing and ventilation of experiences, at the same time engaging in a process to further both individual and organisational learning. Out of this we would also hope to find more clarity regarding the developmental questions and challenges being faced and assess the potential for further accompaniment by the CDRA. I drank another glass of water, noticing how dry my mouth felt at the end of the meeting and promised a proposal by the end of the week.



A remarkable and thought provoking conversation followed the reading of my case. Something stirred for me out of the discussion and feedback that took place. Let me take you into my confidence by sharing with you some ideas and feelings about practice that have been amplified through this experience.

I still regard myself as being a relatively new practitioner in the development sector. Despite this, certain feelings and questions I have lived with in previous working contexts have persisted, again emerging in this case study. My tendency to feel doubt and anxiety about entering the unknown and somehow perceiving myself lacking in confidence to engage the phenomenon of the client system. For some time now I have been able to reframe the anxiety I tend to feel when entering a new situation, seeing it as a healthy tentativeness that would keep me awake to, respectful and appreciative of the client's dilemma and my 'participation' in that situation, hopefully without risking being consumed and immobilised. On the other hand there is also a need on the part of the practitioner to be on the outside without risking the loss of authentic responsiveness to the client's situation and therefore imposition. There is a need to hold the tension somewhere

between passion and dispassion. I can so easily get inside of myself and the client, a temperamental issue I guess, yet entirely necessary for building relationship through empathy and understanding, but potentially I run the risk of losing the outside view.

So how does one deal with this kind of mutual opposition (polarity) encompassing these two critical areas of awareness, that of being both inside and outside of a situation in practice? My sense is that the preference is for the relative safety of the outside, doing the business of providing answers rather than living and grappling with the deeper questions and complexity of the inside. At times I am quite envious of those who have all the answers and frameworks. How blissful it must be to have all these tools and models couched in clever language having universal applicability. Unfortunately this caricature may not be too far fetched in the present day. Still there may be other perspectives



to my feelings of doubt and anxiety. Whether they relate to questions about experience, expertise and personal conflicts should be a continuous focus of my own process of professional and personal development. However returning to the question I am reminded of a thought provoking insight offered by a colleague in response to my case: “*I think that your anxieties fill up space that needs to be occupied by your emptying*” and another, “*when can doubt be a quality rather than a confusing cacophony of voices in your head?*”. There are two ideas here, one of emptying and the other of doubt as a quality which I will attempt to explore a bit further.

I have already hinted at the usefulness of anxiety as an emotion in the context of practice. Anxiety in the normal sense results in a particular physiological response to perceived threat by keeping us vigilant. Though not entirely in a physiological sense one can still argue that vigilance is a necessary condition for a truly responsive practice. This form of tension can help to keep us questioning and interested, holding us alert to fully apprehending the unique dynamic of the client system but equally important, to keep us conscious of what we bring to the situation, our very own strengths and frailties. Is this perhaps descriptive of the ‘emptying’ that my colleague referred to during the case study? However in this case the notion of emptying was raised in response to what was perceived as a more neurotic form of this emotion coming through the sharing of the story. So again a kind of paradoxical element emerging out of an emotional response to the client’s situation. Perhaps the ‘neurotic’ anxiety I am speaking of here is the one which either leads us to patronisingly identify with the client’s problem (stuck on the inside) on the one hand or our need to offer expertise, therefore hasty diagnosis and prescription on the other (stuck on the outside).

Can emptying therefore represent a kind of consciousness where the practitioner can simultaneously be both inside and outside of a situation? Straying to either one or other side of the continuum will mean persisting

with that which is familiar and may I say snug. Truthfully every moment that we experience as we pursue our work is everything but familiar and part of that which is different is to be seen in our very own reactions to the situations we find ourselves in. But do we allow ourselves to appreciate this fully? The challenge in practice is therefore to recognise the need to meet every situation anew, curious and interested, open to being surprised. The notion of emptying suggests an activeness, consciously allowing space in which you are able to experience self and the situation more fully both from the inside and outside. The image that comes to mind is that of breathing. The diaphragm expands creating a vacuum in the lungs that allows the life giving air to be experienced. Can you picture yourself breathing (deeply or shallowly) into the situation which exemplifies your practice. In this sense the story of myself and the client must be seen more as an aspiration than a demonstration of this intention. The new may not have emerged in the situation itself, but through reflecting on it and conversations with like-minded colleagues.

It may be helpful to see emptying as a quality of observation that takes us beyond that which is known into the realm of what we do not know and even what we may prefer not to know. Breaking with familiarity is not easy and will demand a degree of courage on our part. Is this perhaps the source of some of my anxiety? David Whyte’s words add further illumination in this regard:

*“It seems to be the nature of any new territory that we arrive on its borders flat broke. Any new world seems to demand dispossession and simplification. We look back in longing for our previous comforts, which, for all their smallness and poverty, at least had the richness of familiarity.”**

One could even superimpose the words **emptying** and **essence** over *dispossession* and *simplification*. Making meaning is a critical outcome of our practice and a

* I would like to acknowledge the contribution made by Catherine Collingwood, one of my Fellowship colleagues, who shared this quote with us during the course.

necessary condition for conscious change to occur. It is a precursor for fluidity and movement to arise, bringing energies together that allow for shifts to take place in the situation. But seemingly this requires a dispossession of sorts, a letting go of, giving up, losing that which is known and dear to us at least on some level. How can we as practitioners both suspend and allow everything that we are, and that the situation is, in a way that creates enough of a 'hollowness' to be filled by something fresh and new, an essence sending tremors through rigid foundations? In all honesty I don't know, but the question fascinates me deeply and does indeed stimulate a number of thoughts: Acceptance of our own participation, that we also add a dimension to the complex dynamic of the situation into which we intervene. This requires an openness and sense of responsibility. It would demand an appreciation of the element of polarity in complex social situations. Acknowledging the limitations of our thinking and the prevailing dominant paradigms for making sense of

the social condition. We need to seek new ways of understanding and making sense of our world. Here we are referring to a consciousness that goes further than cold analysis, but incorporates a more encompassing grasp of what is truly human.

Finally I want to turn to the notion of doubt. I'm always wondering if I have the capacity to really understand the client's situation and to offer something that genuinely addresses their questions. Yet I do have skills, a competence accompanied with experience that could make me an expert in certain situations. However the doubt persists and I wonder how it could be seen as something that would facilitate my 'emptying'? It's difficult to conceptually pin down the notion of emptying, but I think that doubt forms a key element. Turning this doubt into a quality rather than a distraction as implied by the 'cacophony of voices' during the case study is a formidable challenge. Doubt and uncertainty are as much an aspect of the client's experience as they are the practitioner's. In today's



world the tendency is to seek an antidote for doubt, even settling for denial in the quest for certainty. Therefore the client demands certainty and the practitioner offers it. Doubt can begin to become a quality when the act of **not knowing** can be as deeply valued, if not more so, than the act of knowing.

This would mean acknowledging or even celebrating the ignorance being experienced. I try to imagine a different paradigm in which such attitude and thinking formed a foundation. And then I wonder if the conversation and encounter with my client would have happened in the same way. There may have been more questions and perhaps the diagnosis would have been different. Perhaps the sorrow that lived so close beneath the surface would have been expressed more freely. I may also have been able to share my own feelings and thoughts more honestly. And how would this have contributed differently to the situation that we were confronting together?

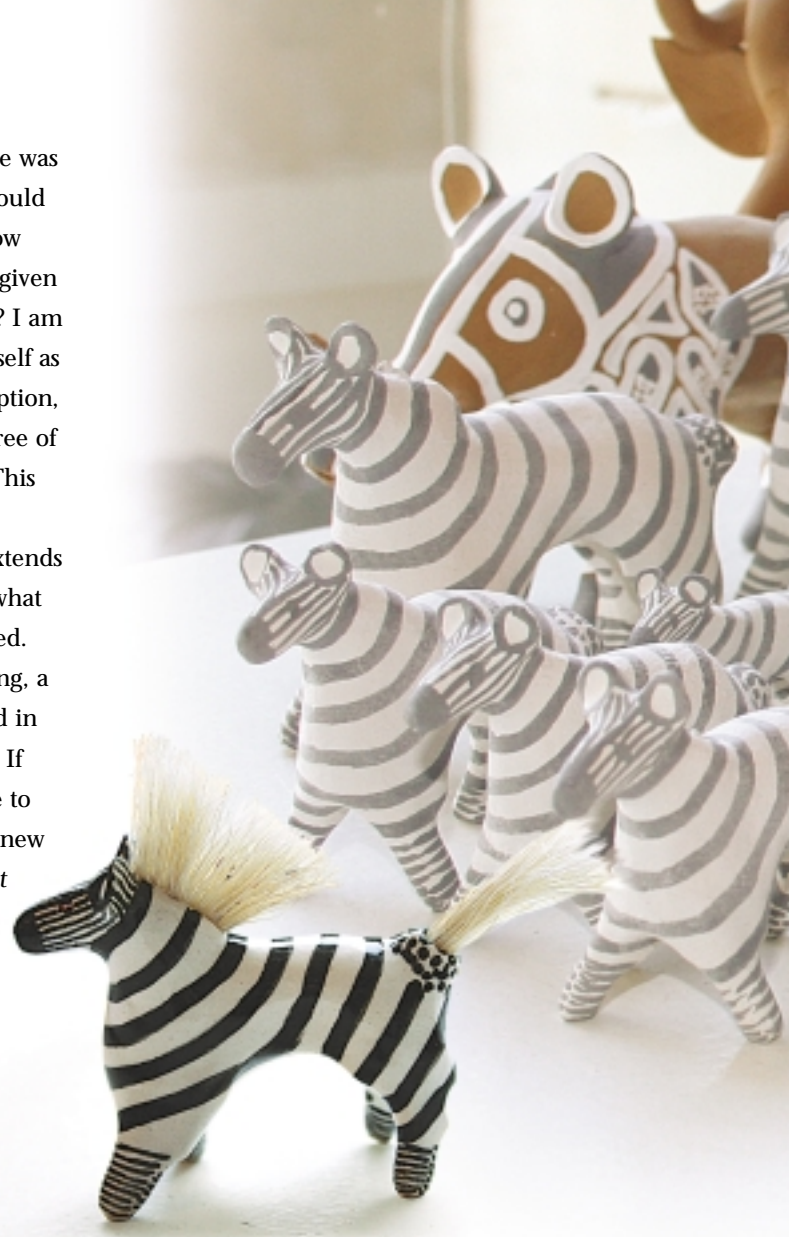
Can we both be in these situations fully and yet be enough on the outside to see ourselves and the situation become an unfolding narrative as if we were watching a movie? In doing so we have to let go of certainty,

otherwise we remain trapped in the realm of that which is known. Here our observation is not just about them but also about ourselves and in both cases consisting of huge tracts of unexplored territory yet to be discovered.

It's so much harder to maintain such a dispassionate distance when dealing with the social. The social is not like nature which we can appreciate and marvel at literally from a distance. Watching a wild animal meeting its death is very different to witnessing the effects of poverty and hunger on a young African child. It does not require robust thinking to see the inextricable connections between the different societies in our world today. This may be an extreme example but the contention remains that we are so much part of the situation that we are intervening into, co-creators of, the social dynamic we find ourselves in. Boldness is therefore a necessary part of a developmental practice because we have to face ourselves if we are to enable others to do likewise. And with this mindfulness we begin to grapple with the paradoxes that are so much a part of our lives and, for that matter, human development.



Returning to the case study. What has amazed me was how what was observed in such a short encounter could have excited so much thought and conversation. How many thousands of meetings are taking place at any given moment in time? And how are they being observed? I am left with this stirring thought: Can I begin to see myself as a container being filled with thought free of presumption, perception freed from the inanimate and emotion free of projection? How can one achieve such emptying? This idea, although daunting, fills me with immense excitement and probably represents a pursuit that extends beyond what is humanly possible, but nonetheless what an amazing ideal, and worthy of the energy expended. Ultimately the practice represents a continuous striving, a continuous extending as new concepts become fixed in the face of the ever unfolding course of development. If this is true, then we as practitioners will always have to contend with the fact that we meet every situation anew or as so aptly put by David Whyte, '*always arriving flat broke*'. Although posing a somewhat intimidating challenge, this insight has also created new spaces and a kind of freedom that inspires confidence, trust and possibility yet unimagined.



Engaging the eyes of others

CDRA's work includes responsive consultancy with development and other civil society organisations and provision of courses that aim to support and strengthen developmental practice.

One of our courses offers an approach to planning, monitoring and evaluation (PME) that integrates these activities into the learning functions of the organisation. Offering both concepts and applied methods, it suggests to participants ways of building rigorous and reliable organisational systems that simultaneously bring learning to the centre of internal organisational life. These hold potential to result in good practice, trust, transparency and accountability.

The first short article that follows is by Judith Smith Vialva, a participant on a recent PME course and Director of a Cape Town based NGO, the Southern African Media and Gender Institute. Here Judith offers an account of her experience of the course and some of her resultant thinking.

On the next page, we share the reflections of Tanya Goldman, Project Manager of Cape Flats Nature, a partner-

ship project of the City of Cape Town, The South African National Biodiversity Institute, the Table Mountain Fund and the Botanical Society. Cape Flats Nature implements the sustainable management of four city nature areas in such a way as to benefit the communities that surround them.

In this article, Tanya describes her experience of an external evaluation facilitated by CDRA practitioners. This evaluation engaged the processes of organisational life, working with its many and diverse collaborators, seeking to yield clear descriptions of the project's accomplishments and difficulties, while simultaneously building capacity to engage confidently with these in the future.

The last short article in this section gives a point of view on monitoring and evaluation from a CDRA Board member. Board members of the CDRA are themselves active in development and here we have used the opportunity to share some of that thinking from one Board member, Judith Mtsewu. Judith's article shows clearly how thinking about these issues in one context can shed light on the same issues when they occur in another.



A course participant

Judith Smith Vialva



There are many words one can use to describe the workshop: Developmental Planning, Monitoring and Evaluation, facilitated by the CDRA during May 2006. However if I was asked for one word to express my experience of this practicum, it would be WOW!

This has really been one of the most exciting and informative workshops I have ever attended. Not often does a workshop support or encourage the idea of reflection and questioning of one's work, practice and the very foundation upon which one supports developmental systems. From the first moment that I entered the home of the CDRA, I could feel some changes that I would like to see in our practice. The welcome, the camaraderie and the general feeling that developmental work is a worthy cause to pursue, enabled me to open my mind to the week ahead.

The methodology used throughout the 5 days, made me rethink and reflect on how we do our work back at the office. Seldom do we share our experiences in a way that makes for interesting, exciting and informative horizontal learning. Usually our projects and programmers are reported on in narrative form (boring) with a couple of photographs chosen at random to add a tincture of creativity. At this workshop, we were encouraged to use colour,

drawings, stories, creative thoughts and above all, good questions to express our positions.

The facilitator clearly had the most exceptional skills in dealing with a diverse group of people. Amongst us were donors, directors of NGOs, independent consultants, field workers, project managers and other development workers. This in itself is a challenging group to manage due to the many different positions held on issues. The exercises and case studies really brought home the various approaches one could and should use in dealing with issues in development.

One often overlooks or forgets the simple guidelines that build good practices. The need to build good relationships, to reflect on past learnings as well as the need for more consultative processes with beneficiaries and other key role players. All too often we become comfortable wrapped in our cocoons and fail to see the bigger picture.

This workshop was a wake up call! A clarion resonating loudly in my ears, calling for action and change and a recipe therewith to consolidate our learnings and develop a 'good' practice to bring about a fulfillment of our aims and objectives. In a few words, which the CDRA uses to describe the objective of the workshop: "Enabling clarity, direction and support"!

A client

Tanya Goldman



I initially approached Sue for advice on developing a terms of reference for Cape Flats Nature's evaluation, without knowing that CDRA did that kind of thing ... I just thought she may have good ideas. I have experience in evaluation as an applied social researcher, but was at a loss as to how to go about framing the external evaluation of a project I was managing!

I also asked Sue for advice on developing case study writing skills in my team. It was part of our brief as a project to learn lessons from our work, and every member of the team, including the nature conservators, had it in their work programme to write a case study of their work. The team challenged me to give them the skills to do it. Again, I've done writing skills training before, but ...

Now I think my feeling of being lost with these familiar tasks was because I was looking for something more than what I knew. Something that went beyond the logical framework that guided our work programme, our systematic reports to donors with all the necessary facts and figures neatly filed, and even something more than the participatory processes I was familiar with. Something about doing case studies

that wasn't about writing skills. Something that wasn't just about a report. Something that added value through the process. Something that left us having learnt something we didn't know before, and able to act on that knowledge.

We got the 'something more' I was looking for.

The evaluation involved the institutional partners in the Project Advisory Group and the project team in framing the issues, providing input through interviews and framing the outcomes. Community stakeholders were involved through a Champions' Forum dedicated to the evaluation process, and some additional interviews.

This is the type of participation I am familiar with. But the process was different because it wasn't just about how well or otherwise we'd done, but also about where we wanted to go and what needed to shift in the relationships – within the team and between the project and its partners – to get there. It not only exposed some of the inherent tensions in the design of the project, but took us through a learning process that contributed to us understanding and managing these tensions better. It was as much an



organisational development process as it was a project evaluation.

Sue and Rubert engaged with everyone with empathy, but also challenged us to identify the blockages and ways through or around, or different paths. For me as the Project Manager from the start, I often felt insecure and judged and wrong in the process, but I knew for sure that this judgement wasn't coming from the evaluators. This helped to work through what I needed to act on from the feedback I got and how to do this, although it did still feel lonely at times!

The project team also contributed to the evaluation through the development of case studies. The case study workshop was about listening and story telling, rather than writing! It presented us with a methodology for sharing lessons, dilemmas and challenges in a creative and supportive way. It developed the attitude for sharing and listening as equals in a learning process.

The evaluation report was sharply analytical and refreshingly short and easy to read, although some members of the team found the language too complex.

Some institutional partners were frustrated that some outcomes of the evaluation told them things they knew already, but I felt it was an important finding that the underlying assumptions of the project design were sound. Others found it insightful and "very, very fair".

We shared the outcome of the evaluation in the conservation community, and were surprised by how well it was received. We were one of the few projects to have commissioned an external evaluation, and also stood out because we didn't hide the real weaknesses that were exposed, but rather acted to rectify them. We also used the evaluation as the basis to write a booklet about the lessons of our first three years, 'networking people and nature in the city'.

The impact of the evaluation process on us as a team has been profound. Nine months later, relationships between the core project team and the conservators have matured dramatically and our monthly case study workshops are rich with the diversity of voices and ideas. The institutional relationships have taken further process work to work through, but the project team was empowered by the evaluation to understand the tensions more clearly.

A Board member

Judith Mtsewu

Having worked in Academic Development at two separate tertiary institutions, I soon learnt that the value of my work and our work as the Writing Centre was determined by the number of students we saw per day, per week, per semester and per year. Often we were reminded of the importance of record-keeping because, as my former Head of Department pointed out, “we had to constantly justify our existence and funding requests to the university.” In the first institution, the client to be provided with statistics reflecting the utilisation of the Centre was the donor and in the second institution, it was the university funding agency.

I struggled with this kind of evaluation of our programme because I felt it missed the purpose of the Writing Centre. How did the numbers say that what we were doing was effective? Could I really say with conviction that I had made a positive impact on the students I had seen? Did students actually “write better academically” after a consultation, which is what we were striving for? I felt strongly that numbers did not conclusively answer this. But what this

principle assumed was that quantitative measure is always appropriate, through the use of objective measure to evaluate performance.

Often donors and funders expect organisations to report on impact of programmes and interventions. But how many of the real benefits of government and non-governmental organisations’ activities lend themselves to such measurement? Ultimately what these institutions concern themselves with is not profit, but often qualitative changes in people’s lives. So how does saying that NGO XYZ serviced a number of community groups and non-governmental organisations give insight into the quality of that intervention as well as its impact?

Furthermore, to organisations, often the indicator to be measured might be very different to that prioritised by the people on the ground, in my case the students. I was interested in how many of the writing principles they understood and were applying in their written work. To them, the core indicator of the value of our work was getting an A whereas for us it was writing a paper, that was clear and coherent,



had a logical argument, integrated other sources well and answered the question, amongst others, even if it did not get an A. This leads to the question of who has the right to decide on the criteria of the evaluation process.

Through this experience I also learnt that evaluation is about power relations. A notion that is rarely acknowledged. It is a fact that it is often a person or organisation in a position of authority and power that exercises evaluation over subordinates. In my case, I was made aware of this when we introduced an evaluation sheet which students needed to complete. We noticed that there was very little critical feedback of our work. Obviously this might have meant we were really very good at what we did. But it could also be interpreted as students giving feedback which they thought we wanted to hear, because of the power they assumed we had. Often their question to us was “what will happen with this form?”. We later learnt that they feared these forms would be handed over to the lecturers, despite our assurances that they would not be. In the organisational environment, CBOs and

NGOs might fear losing access to funding opportunities if they insist on reporting on qualitative impact rather than statistics, or worse if the numbers are not high enough. This can lead to organisations focusing on increasing statistics just to ensure continued access to donor funds.

To conclude, monitoring and evaluation cannot just be about numbers, especially when the objective is to achieve qualitative impact. Monitoring and evaluation has to include both elements of quantitative and qualitative monitoring and evaluation methods so as to address the shortcomings of each method. Furthermore, it can also not be a decision that those in positions of authority make without the input of those to be evaluated. Their inclusion is likely to lead to a buy in and a greater chance of success of the intervention. But does this apply in all cases? It would, of course, be very difficult in my Academic Development example to consult with all students when deciding on an evaluation tool, but I certainly see it working in organisations within the civil society sector.



A story from practice ...

A review process of a big development project brought together key stakeholders in a three-day process. The presentations from the experts and field staff focused on achievements of activities and how the financial resources had been spent. After the presentations and discussions, which not all the farmers, who were the 'ultimate beneficiaries,' could follow, the farmers themselves were given opportunity to share their experiences of what it was like participating in the project. One of the farmers stood up and shared the following:

"I am a livestock keeper who was fortunate to have the opportunity to be part of this big project. Together with my peers we decided to engage in an improved dairy goat project. I have to confess that this project has changed my family life. I am traditionally a polygamist, married to three wives.

Before the project most of the household chores were done by my wives and I was doing the supervision. This is typical in my culture, the role of the man is to supervise and oversee the women. The involvement of my family in this project introduced different dynamics into the household; the way in which we relate and share roles/responsibilities has changed.

The project in which we participated included a number of activities which required that, as a family, we discuss and make decisions about how we were going to allocate roles and responsibilities around the household. The outcome of such allocation is that everybody, including myself, is seriously involved in the household tasks – there is now a lot of sharing of responsibilities between me and my wives. This has also improved our relationships. I find this interesting and exciting; even more exciting than the goats I have and the milk I am producing."



The theme for this year's annual report was inspired by a collaborative learning process with peers and organisations with whom we enjoy collegial relationships and who are committed to innovative and radical thinking about development practice and organisational learning processes. In February 2006 a group of practitioners from seven organisations that engage in regular organisational learning processes came together to share experiences and stories of their learning journeys. The organisations were Cabungo (Malawi), Olive (Durban), Educo (Cape Town), Intrac (Oxford), EMG (Cape Town), Trace (Tanzania) and CDRA. The particular interest of this gathering of practitioners was how learning organisations relate to monitoring and evaluation.

In this process the group of practitioners explored monitoring and evaluation as organisational functions that are related, but not identical and that fulfil specific purposes within the organisational system. The organisations that participated in this collaborative learning process all commit to regular learning processes that enable them to consciously and continuously reflect on their work, learn from their own experiences and draw learning which is used to improve future action and practice. Through sharing experiences of their unique and particular learning journeys, it became evident that these organisations face questions about their own monitoring and evaluation practices. Similar to many other practitioners and organisations they face demands to monitor and evaluate their work in ways that are meaningful, appropriate and creative. While the group acknowledged the importance of monitoring and evaluation as organisational functions, they simultaneously expressed concern and frustration at the growing emphasis on monitoring and evaluation in the development sector.

As part of the development sector we have been witness to discussions and deliberations on monitoring and evaluation

over many years. On closer observation we see how we are stuck at the level of tools, methods and instruments – for instance the logical framework – the limitations of which we are fully aware, despite its continued use. As part of our own learning we have often wondered and questioned where the real value of monitoring and evaluation lies; we would suggest that it may lie at the level of orientation and purpose rather than that of method.

We have seen the pre-occupation with 'effectiveness and efficiency' in the development sector. In spite of all the efforts, it remains questionable whether the shifting focus and debate have contributed towards clarity on monitoring and evaluation, or indeed, clarity of purpose and effectiveness of practice. Despite the limitations of current monitoring and evaluation practice, there seems little intention to shift away from the dominant paradigm that shapes it – externally-driven, top-down, event-type – towards more inclusive, participatory practices that focus on outcome and impact, explore alternative approaches to collecting and sharing information and allow for facilitation of genuine human connection.

Here we offer a particular perspective on monitoring and evaluation: one that challenges the dominant paradigm and the practice that flows out of it. In our view, what is missing in the current monitoring and evaluation practice is an orientation and approaches that integrally link monitoring and evaluation to organisational learning processes. We share some of the ideas, insights and learnings that emerged from that particular gathering of practitioners and have been deepened through the CDRA's own ongoing reflection and learning processes. These ideas, insights and learnings are offered with the intention to stimulate further conversations and ongoing dialogue among the broader community of development practitioners.

Transparency of process – monitoring and evaluation in learning organisations

Nomvula Dlamini

*“Where managerialism is the ism to make all isms wasms,
the new 200 Dewey Decimal, the delirium of our age” –*

Jeremy Cronin

Striving for efficiency: a results-orientation and managerialist approach to monitoring and evaluation

Currently, in development, many questions are asked about the value of interventions; development organisations and practitioners increasingly face demands to measure the results of their interventions – they are challenged to concretely show the difference they are making in the lives of impoverished people. There is an increasing demand to demonstrate the effectiveness and impact of development interventions.

This urgency around ‘results’ continues to shape monitoring and evaluation as organisational practices in the development sector. Flowing out of such thinking is an instrumentalist managerialist approach to monitoring and evaluation that is mechanistic, and is about expert-driven processes that focus on outputs, activities and indicators. They confine themselves to narrow definitions of accountability. Such an instrumentalist management approach tends to focus on how resources are delivered and utilised and is inclined to use monitoring and evaluation as an exercise through which outputs are controlled according to contractual



obligations and agreements. Although this instrumentalist management approach to monitoring and evaluation is striving for efficiency, it often interferes with the intention of organisations to stand back from their 'doing' and genuinely try and see how things are going.

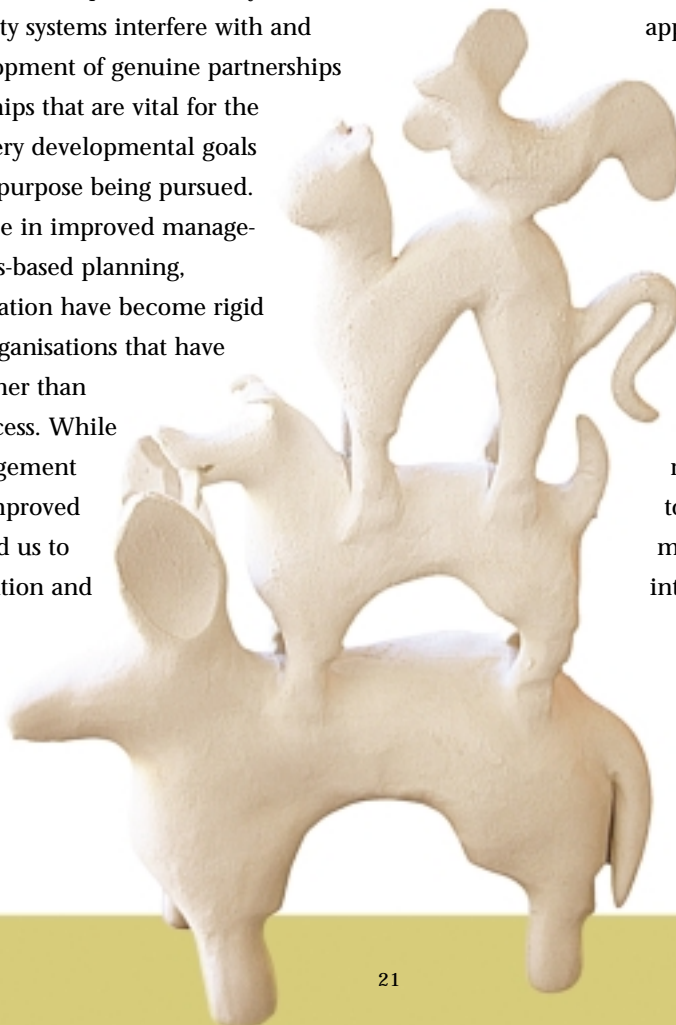
In trying to understand the urgency around 'results' we recognise various realities within the development sector. Over the last number of years the increase in the volumes of development aid has resulted in increased conditionality – recipient organisations and governments find themselves having to satisfy a great deal many more externally-imposed conditions from donor agencies. While such action is appreciated, it has also resulted in the need for much tighter accounting by recipient organisations and governments. As a consequence, upward accountability has become stronger and less attention is given to the real institutional and social issues that these initiatives are meant to be tackling. On the whole, this strong upward accountability does not nurture sensitivity to or awareness of being accountable to the full circle of relationships within the system. Imposed accountability systems interfere with and undermine the development of genuine partnerships and human relationships that are vital for the achievement of the very developmental goals and transformational purpose being pursued.

While there is value in improved management practices, results-based planning, monitoring and evaluation have become rigid instruments within organisations that have focused on results rather than relationships and process. While instrumentalist management practices may have improved efficiency and enabled us to account for the allocation and

use of resources, they have not necessarily made us more conscious of and able to build the very relationships that our practice depends on. Inherent in such an instrumentalist management approach is a strong tendency toward control rather than trying to understand things.

For us this growing demand for more effective monitoring and evaluation is an indication that the development sector continues to struggle with the flow of information between the different role players. Information sharing has taken the place of communication and 'relationship' has not necessarily been core. We see highly refined mechanisms for extracting more and more information. Alongside this, we notice recipients of donor funding beginning to question the usefulness of the information that is being demanded and observations that while the one-directional flow of information persists it has not been accompanied by clear questions about what we need to know and change in order to increase effectiveness.

The challenge therefore is to explore approaches to monitoring and evaluation that would enable us to let go of control and open us to the risk of making meaning out of our work, allowing new forms to take shape, enabling us to see these and learn from what is emerging. An orientation that allows for flexibility in terms of responsiveness and adapting to changes within the environment and the system being intervened into.



'Managing poverty away'

There are also growing demands for development organisations to show the specific difference they are making to poverty reduction, using monitoring and evaluation techniques

Indeed, poverty remains an elusive challenge. The wealthy countries of the world are committing larger volumes of development aid to address poverty in the rest of the world. The call from global civil society and (global) icons for an end to poverty and practices that dehumanise and exclude has resounded all over the world. We remain conscious that poverty, including all related social ills, has been part of the context of development for a long time. Over time we have seen how poverty has become politicised and proved increasingly difficult to deal with. We see how all sectors of society – the state, the market and civil society – are struggling to find ways of addressing poverty.

In the "war against poverty" we continue to observe the influential role that donor agencies continue to play – their involvement and support for the poverty reduction strategies and policies (PRSP) and millennium development goals (MDGs) of developing countries has been accompanied by an expectation of quicker results. We are aware that resources have always played and continue to play a role in development. But there seems to be a fresh understanding of the power of resources and the role they play in different development agendas. The way in which resources are used to drive processes and the power associated with this is cause for concern. We have seen how struggles with addressing poverty have resulted in frustration and some of this frustration has been directed towards those who are recipients of such resources. Increasing demands are made of them; they not only have to demonstrate that they are making progress in terms of addressing poverty, but are challenged to demonstrate and measure the results of their interventions.

Further, we observe in the sector more complex mixes of development aid and complicated channels through which resources flow. So, there are higher

demands for disbursement by those who provide the resources. In the same vein, they demand quicker disbursement and with greater effectiveness and efficiency. Subsequently, recipients of resources, whether they be governments, development organisations or communities themselves, experience an increase in pace accompanied by increasing pressure for demonstrating the effectiveness and efficiency with which resources are utilised.

Somehow an illusion is created that the quicker the resources are distributed, the bigger the 'impact' on poverty and this is coupled with an almost overwhelming belief that poverty can be effectively and efficiently 'managed away'. This urgency around the need to demonstrate 'results,' specifically with regard to poverty, has resulted in an emphasis and focus on monitoring and evaluation.

Holding tensions

At the same time, we must accept and recognise that our sector has benefited much from incorporating improved management practices. There are aspects of our work that are about defined, time-bound projects delivering measurable resources and services. For this, conventional planning, monitoring and evaluation is a useful way of holding ourselves accountable. It has ensured that we take responsibility for and are able to account for the use of resources.

However, there are also aspects of our work that are not defined by time-bound 'deliverable' projects. These aspects live in the realm of the invisible and intangible and we have to take responsibility for accounting for these as well. While we monitor and evaluate with ease the use of resources, we should also be in a position to monitor and evaluate the deeper, more subtle changes that result from our interventions.

However, there is constant tension for those development practitioners and organisations committed to nurturing a developmental approach to monitoring and evaluation. They remain torn between proving that they too can work with rigour and exactitude,

while remaining committed to transforming systems and practices (including monitoring and evaluation) that exclude, and constrain freedom, responsibility and autonomy.

We recognise that even in an instrumentalist management approach, monitoring and evaluation is linked to a form of learning. However, in linear, mechanistic-type applications, monitoring and evaluation is central to learning that adjusts interventions towards achieving what was planned. The emphasis is still on achieving the objectives that were identified during the planning phase.

It is only when we acknowledge the limitations of an instrumentalist approach to monitoring and evaluation that we will feel challenged to explore the kind of orientation, processes and relationships that will enable a more creative, meaningful and appropriate monitoring and evaluation practice at all levels within the development sector.

We believe that organisations that engage in regular learning have some experiences to share about creative organisational processes that focus on learning to address issues of accountability, monitoring and developmental impact. What we have in mind here is transformational learning. This is the kind of learning that goes beyond simply adjustment in order to achieve objectives. It expands consciousness and shifts thinking, feelings and action in ways that are dramatic and irreversible.

How do learning organisations relate to monitoring and evaluation?

For those engaged in organisational learning, monitoring and evaluation is shaped by a different paradigm. These practices are embedded in the most fundamental learning orientation and attitude and are seen and engaged with as an integral part of their work and practice. For them monitoring and evaluation is not something that is external to or separate from the work and practice of the organisation; it lives at the core of who they are, what they do and how they relate to others and the world in which they pursue their developmental purpose. It is a process that is deeply ingrained into the way the organisation works; it lives at the core of its identity, practice and dominant orientation. Some of the features include:

A questioning orientation

A learning orientation causes organisations to constantly and continuously question themselves. Not only do they question their actions; they question their organisational purpose, the processes through which this is pursued and the contribution they seek to make in their environment. A questioning orientation is central to a learning culture and practice. For learning organisations, monitoring and evaluation at their best, should be



an orientation to practice that entails constant and continuous questioning of organisational purpose, actions and practices.

Both these organisational functions should be informed by a genuine and honest commitment to stand back from the 'doing' with regularity and reflect on how things are going. They should become critical functions through which the organisation constantly assesses whether it is successfully translating its strategic intent into action. A commitment to good monitoring and evaluation demands an ongoing process of dialogue through which the organisation seeks clarity about its sense of self and through that gets drawn into facing its connection to others. A questioning orientation should, therefore, lie at the heart of monitoring and evaluation and be integral to the orientation, culture and practice of the organisational whole and all those within it.

Engaging in regular learning demands that monitoring and evaluation be built into the regular organisational processes in a way that ensures that they become integral to the thinking and doing of the organisation. When viewed in this way, as an orientation to practice, these organisational functions become the source of questions for ongoing learning and development. Monitoring and evaluation become integral to organisational processes that build the independence, strength and competence of organisations, and seek to enhance their transformational purpose. In other words, monitoring and evaluation that is integral to the life of the organisation becomes a true source for capacity enhancement.

Transforming power relations

Once an organisation starts to engage in organisational learning in a more conscious and purposeful way, its relationships start to change. This starts with the relationship to self; organisational learning causes the organisation to see and think of itself differently. This then moves on to its horizontal relationships – the interconnections that sustain it and connect all involved to the source of their collective power.

Externally-driven monitoring and evaluation does not provide organisations with the space, relationships and freedom that enable expansion of their horizontal relationships. On the contrary, it undermines connections that enable realisation of collective power.

Learning challenges individuals and organisations to be true to self and to others; it demands courage, honesty and integrity. Once the courage is mustered, learning processes unlock consciousness of an emerging self, a self that continues to evolve in a world that is also evolving. A questioning orientation enables the emerging self to engage with the world in a meaningful way. When individuals and organisations commit to learning, it enables them to bring more of themselves into shaping the world and in turn allows them to be shaped by it. Monitoring and evaluation is aimed at ensuring accountability; but genuine, meaningful accountability is about being true to self and others. In this way, when monitoring and evaluation is undertaken out of a learning orientation it not only enables an organisation to face itself with honesty, but to share that truthfully and transparently.

From a learning perspective we see monitoring and evaluation as one of the pillars that give shape to the development sector and to the relationships that give it form. Conventional monitoring and evaluation has been a crucial means of introducing a more conscious, purposeful, planned and 'businesslike' approach to many organisations in the development sector. But, as learning organisations committed to shifting the power relations in society that impoverish and exclude, we are concerned that it is becoming too much of an end in itself. Our experience suggests that while there is evidence that monitoring and evaluation can contribute significantly to improving the efficiency of delivery, it has a tendency to reinforce rather than transform existing power relations.

It is therefore vital that we seek to build trust and transparency into all the relationships within the sector. Those who make available the resources have the right to ask recipients to account for the resources earmarked for the purposes intended. It is our experience that

accounting for the resources is potentially very easy. But, building trust is a more complex relationship process that requires time and commitment – it requires that we seek opportunities to build relationship and work through relationship. Further, it requires that we move away from cumbersome reporting processes that focus on information instead of engagements that build and deepen understanding and connection. While written reports are important as a record of accomplishment, the relationship would be better served by using simpler procedures that enable organisations to account efficiently for inputs and outputs.

Living the principles of participation and accountability

An organisation that is committed to good practice in terms of monitoring and evaluation is challenged to live the principles of participation and accountability. In its engagement and relationships it is challenged to demonstrate uncompromising accountability to those it engages with. Paradoxically, when monitoring and evaluation are pursued for learning, transparency (and so the basis for real accountability) is placed centre stage.

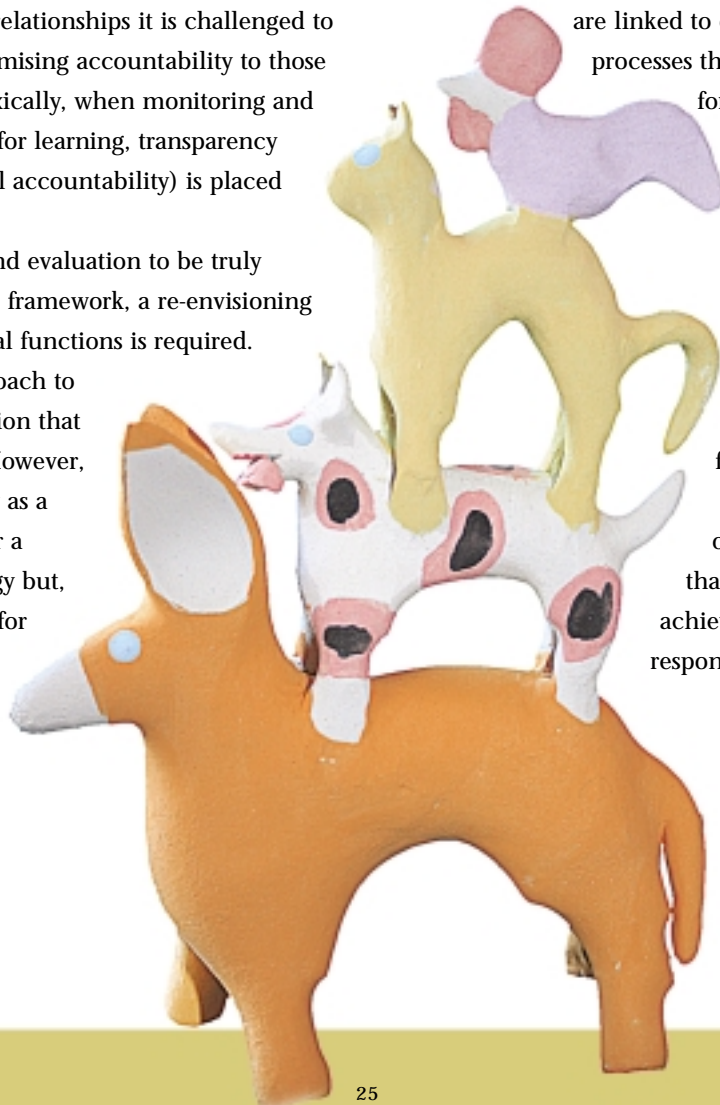
So, for monitoring and evaluation to be truly underpinned by a value framework, a re-envisioning of them as organisational functions is required. Central here is an approach to monitoring and evaluation that ensures participation. However, participation not simply as a tool for manipulation or a fashionable methodology but, as a process that allows for the ‘voices’ of all

concerned to be heard. It is these voices that are the source of data. Within an organisation that engages in regular learning, participation is not just rhetorical or symbolic. Rather, the knowledge, skills, abilities, experiences and capabilities that each individual brings to the organisation are recognised as well as their role and contribution to the effective functioning, learning and ongoing development of the organisation. Participation therefore, is absolutely central to achieving transparency.

As organisational functions, monitoring and evaluation practices aspire to create spaces that allow for people to express themselves, shape their experiences into stories that can be shared and enable them to connect to their own power. They should be undertaken in a way that gives ‘voice’ to people and makes them conscious of the fact that they bring something to the world. Monitoring and evaluation activities that

are linked to organisational learning processes therefore allow for space for the voices, experiences and knowledge of all to inform the direction and purpose of the organisation.

By shifting the focus to organisational learning, both monitoring and evaluation find their rightful place – not only as mechanisms of control but as practices that can contribute towards achieving greater freedom, responsibility and autonomy.



The next challenge for those of us already focusing on learning is to build our confidence and our ability to share with others how we do it and what we have learned. Through organisational learning we must find ways of encouraging each other to bring more of ourselves into shaping our (collegial) relationships and our world.

“Consciousness that is both what we are and the source of what we are is larger than we are. Never forget that it is not where we go or what we do but the level of awareness we bring to our actions that determines whether or not we are fully living our life purpose” Oriah Mountain Dreamer

Bringing life into monitoring and evaluation through learning

Engaging organisational activities such as monitoring and evaluation from a learning perspective gives them a different character. It turns them into flexible and responsive processes that are attuned to the unpredictable changes within a particular situation. When flowing out of a learning orientation, monitoring and evaluation recognises the complexity of how change occurs in living systems and how it needs to be responded to. Out of a responsive paradigm, monitoring and evaluation activities put the emphasis on facilitating ‘real change’, rather on the methods and instruments for adjusting interventions.

Real change, we should remember, has overtones of a journey at the heart of which is an ongoing search or quest. Out of a learning orientation, we do not see change as a linear process with clear and direct movement from the current state to the desired one; it does not become a journey towards a specific destination. From such an orientation change is seen as providing the opportunity for organisational development and empowerment. It is a process that is integrally connected to self-concept. It becomes an impulse that arises out of a reflection process that enables an individual or organisation to transcend the usual defences and

inhibitions. Change becomes a process that enlarges and nurtures the relatedness between elements within the organisational system.

This does not mean that change does not bring with it struggles and challenges; such struggles form an important part of the journey. From a learning orientation, change becomes a process of ongoing improvement. Monitoring and evaluation that is shaped by such an orientation should endeavour to develop approaches and methodologies that will help to bring about transformational change in individuals, organisations and communities.

Once an organisation has embarked on a journey of learning, it is challenged to find the courage to hold itself accountable to itself first, and then to the external. This requires the courage to embrace its vulnerability and to nurture a practice of self-evaluation which forces it to face itself. This means having the courage to connect with its deepest questions, experiences, feelings (even those that are harder to face, such as fear and anxiety) and intentions despite the uncertainties and odds it faces. Most importantly, the organisation needs courage to act on what it has learned in ways that brings it to a new point in its development; it has to have the courage to ensure that its past and present experiences, positive as well as negative ones, inform its ongoing development. Elements of this approach include:

Monitoring and evaluation as an inside out process

Monitoring and evaluation that is linked to organisational learning becomes an inside-out process; it starts with the self and then extends outwards to the organisation and then beyond. This enables a flow of consciousness from the inside out. It allows for growing consciousness about own actions, strengths, weaknesses and developmental purpose. It requires that individuals and organisations go first into themselves and unlock a consciousness that will enable them to shift their relationship to self. Monitoring and evaluation, therefore, serves firstly the learning needs of the internal

and out of that is generated the material that serves external purposes.

Questioning purpose and identity

Transformational learning brings with it new consciousness about social purpose – about identity. If learning is the impulse that gives life to the organisation, then this learning, necessarily, enables it to remain connected to its broader, social purpose. This goes beyond sustaining activities for their own sake; it is about sustaining activities that champion social purpose and embrace civic responsibility.

To achieve this, the organisation has to constantly question its purpose and accomplishments in context, and this has to become central to the way in which it engages with its environment. Out of such questioning the organisation is continuously shaping its purpose, keeping it fresh, relevant and meaningful. Learning, undertaken as a continuous, conscious process, enables an organisation to achieve clarity about social purpose and the contribution it seeks to make. Seen in this way, monitoring and evaluation lives at the heart of this quest for clarity, and at the heart of monitoring and evaluation is a questioning orientation.

Learning changes an organisation and enables its ongoing development in the context in which it works and operates. It heightens awareness about its social purpose and of the experiences that have shaped it. Through learning from its experiences, the organisation does become more conscious of and in touch with its environment and what it seeks to achieve within that.

Learning therefore enables an organisation to carry through its intent, and allows it to see what is possible. As it engages in learning, the organisation develops a comprehensive picture of itself and is able to engage with this in a meaningful, questioning and critical way. Through this, critical awareness of itself is expanded in a way that enables the organisation to remain in touch with its social purpose. This process should be a rigorous one – it has to be guided by deep, honest and truthful questioning.

Monitoring and evaluation should be central to that process of shaping identity and questioning social purpose – it is through monitoring and evaluation processes that an organisation is provided with the information that enables conscious and continuous engagement with the environment. As organisational activities they afford the organisation the opportunity to ask “what do we want to know”? What an organisation wants to know is linked to what it thinks is important

and what it thinks is important is what matters. In development work what we think is important is linked to our values.

So, monitoring and evaluation as organisational practices become underpinned by a value framework. The type of information an organisation seeks, the way it uses that information and to what end it uses that information is a value-driven process.



Improving practice through ongoing learning

The motivation for any organisation to learn should be to improve its practice. Learning processes help to make practice conscious and enable the organisation to engage with its practice more consciously and rigorously. In the development sector ongoing learning is critical for building development practice as a discipline in its own right. Development practice has a purpose to it; it seeks to act in and on the world towards achieving developmental purpose and for this reason it needs to be shaped by continuous learning into a disciplined and rigorous method.

In an organisational context converting learning into improved practice is not an easy task. The organisation has to explore various ways and means of collecting and sharing experiences from which to learn. The challenge is to develop practices and methodologies that enable the organisation to distil learning with practical relevance from experience and to unlock the courage to act on such learning. This requires that particular skills, abilities and capacities be developed to contribute to the organisational learning process. It is in this regard that monitoring and evaluation become critical – these functions should contribute towards helping the organisation translate its strategic intent into effective actions and practices.

In essence, monitoring and evaluation contributes to knowledge creation and the making of meaning in organisational process. Clearly such a role demands a shift in focus away from being simply information generating activities. As organisational practices they have to ensure that learning and knowledge are created out of individual and collective experiences and reflection. At the same time, these functions should not be constrained by present knowledge and methodologies. In fact, when shaped by a learning orientation, monitoring and evaluation can enhance the thinking that contributes towards the ongoing creation of knowledge, approach and method.

When monitoring and evaluation serve the purpose of bringing together the processes of information gathering and knowledge creation, then the practice of documenting learning becomes critical. In many organisations documenting learning takes the form of reports that are written and stored away. For these organisational practices to truly contribute towards improving practice, they have to be kept alive through ongoing learning. In this way, they are certain to feed the thinking, doing and (ongoing) development of the organisation.

Freedom, responsibility and human connection

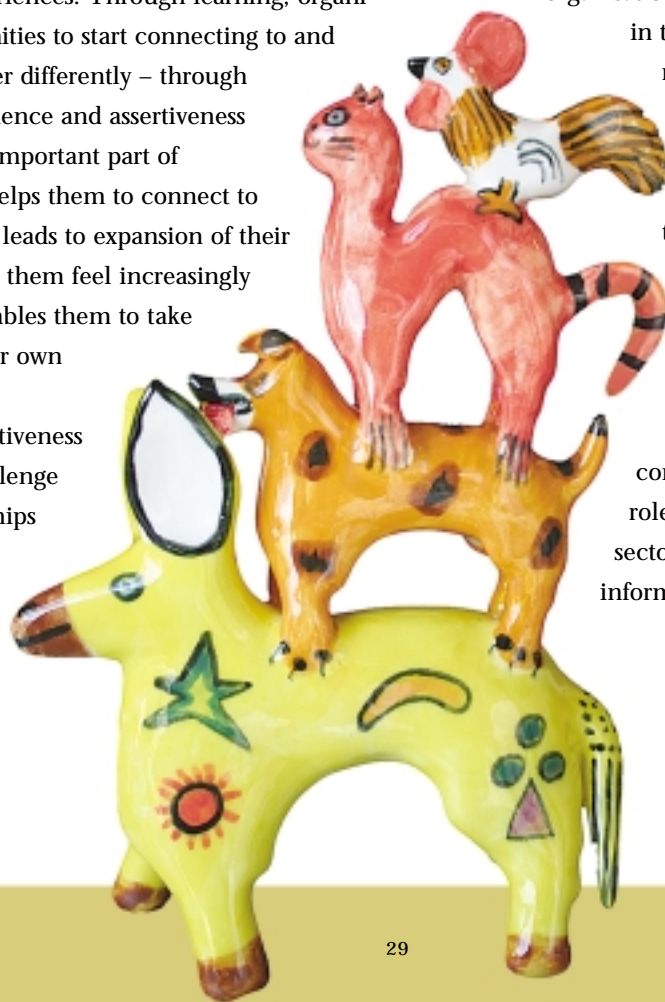
In the development sector we have become accustomed to look for monitoring and evaluation in reports, procedures and systems. The development of coherent, organisation-wide monitoring systems is encouraged and supported. While there is value in having a coherent monitoring and evaluation system, it is not everything. Monitoring and evaluation should not only be looked for in reports, it has to live in the culture and orientation of the organisation as a whole and the individuals in it. The practices of monitoring and evaluation have to contribute towards increased understanding, thinking and practice within the organisation.

However, for monitoring and evaluation to come alive in the culture and orientation of the organisational whole, the organisation has to take responsibility for the development and change of the world in which it operates. For this to happen, there has to be freedom to learn and when this is realised, the responsibility to do so is expanded. When happening from a free space, learning creates more opportunity for choice and for substantive decisions; this enables responsible action. Monitoring and evaluation should therefore provide the appropriate information for allowing such choices.

Monitoring and evaluation that is integrated into organisational learning processes contributes to achieving greater freedom and responsibility – these

functions help to create space for the voices of the marginalised, the 'voiceless'. In fact, if we fail to link monitoring and evaluation to organisational learning processes we reinforce practices that undermine freedom, responsibility and ownership – we reinforce exclusion, prevent people from assuming responsibility, deny autonomy and thus perpetuate dependence. So, engaging with monitoring and evaluation from a learning orientation helps to create consciousness about the situation in its totality, including the power relations that bind the different stakeholders in that situation.

We have observed that as an organisation begins to learn more consciously, it becomes aware of, and is able to connect to, its own power. It also becomes aware of how much power it gives over to others; especially the power that organisations give to donor agencies. But, being aware of and connecting to own power is only the beginning. Learning organisations that are involved in social development are constantly challenged to work towards transforming unequal power relations. Power imbalances can and do undermine the ability to learn from own experiences. Through learning, organisations find opportunities to start connecting to and using their own power differently – through learning, their confidence and assertiveness grows and this is an important part of development. This helps them to connect to their own power and leads to expansion of their freedom. This makes them feel increasingly independent and enables them to take responsibility for their own actions. The growing confidence and assertiveness enables them to challenge established relationships and act with greater intent in the world.



What challenges should organisations overcome to truly learn from monitoring and evaluation?

We have to recognise that building a monitoring and evaluation practice from a learning perspective is not easy. For those organisations already focusing on learning, one challenge they face is building monitoring and evaluation practices that live in the culture and orientation of the organisation as a whole and the individuals in it. In order to truly learn from monitoring and evaluation, we have to meet various challenges in our work and practice:

Facilitating human connection

Human relationship is the medium of our work. However, many of our methods and approaches to monitoring and evaluation conspire to keep us out of relationship. There has to be commitment to building genuine relationships and to ensure honesty of engagement – both in the development sector as well as in organisations. This calls for an investment in time and space for building relationship and facilitating deeper understanding of each other's realities in ways that are honest, open and transparent. We have to begin to attach greater value to relationship and not seek to substitute this with more and more intricate mechanisms to ensure information flow. The communication between various role players within the development sector has to be less a process of information extraction and become a

true opportunity for facilitating human connection. We have to recognise and have greater appreciation for the centrality of relationship in development processes; we increasingly have to allow for relationship to be the channel through which our engagement happens.

Moving beyond methodology

The majority of the methodologies that we have developed for monitoring and evaluation so far emphasise a scientific approach to evidence – one better suited to the challenges of the material world. These approaches do not attach the same value and importance to the informal, subjective and anecdotal material that our work is primarily concerned with. In instances where tensions between the two types of evidence are perceived, attempts have to be made to resolve these in ways that will ensure that both types of evidence enjoy their rightful place and contribute towards the learning of the development sector. Further, we have to move beyond our stuckness on methodology. There is a challenge to free ourselves from traditional methodologies such as, for example, the logical framework, and develop methodologies that enable us to capture the complexity and richness of the situations into which we are intervening. In doing this, however, we have to guard against oversimplification of the reality.

Nurturing a culture of critical self-reflection and self-evaluation

We remain aware that despite all the participatory methodologies we have designed, monitoring and evaluation still do not take their direction from the situations into which we are intervening; these practices continue to take their direction from forces that lie outside of these situations. This challenges our understanding of development. If we truly see and understand development as an innate process into which we are

simply intervening, then monitoring and evaluation have to take their direction from what is living and moving inside these situations; then, there is no space for externally driven, event-type monitoring and evaluation.

The real challenge facing us as development organisations is not only about improved methodologies, systems, participatory approaches and indicators. Our real challenge then is about nurturing and building a culture of critical self-reflection and self-evaluation which will enforce new kinds of accountability – the kind that enables individuals and organisations to hold themselves accountable first and foremost to self, to social purpose and not only to external forces. It is through critical self-reflection and self-evaluation that we will be honest about our own actions in the world and the underlying intentions of such actions. A culture of critical self-reflection and self-evaluation will not only help us remain in touch with the essence of our own being; it will also ensure we understand and remain in touch with the developmental goals and transformational purpose we seek to achieve in our context.

The creation of resilient organisations

Learning, we should remind ourselves, is the process through which an organisation sustains the interconnections through which it knows what it knows and therefore becomes an effective, competent and thinking entity that can realise its transformational impact. Monitoring and evaluation that is integral to the life of an organisation contributes meaningfully towards sustaining the interconnections. Monitoring and evaluation therefore should not become something that organisations do when they stop doing or are doing nothing else; it should be integral to the process of 'doing' – these practices should continuously inform and shape that process of 'doing'. As functions that are integral to the life processes of the organisation, they should make learning less dramatic and more conscious and sustainable.

We should ensure that monitoring and evaluation become a ribbon of rhythm drawn through organisational learning processes. Such a rhythm should be natural to the culture, systems, procedures, structures and processes of the organisation. As organisational functions they should ensure that, through its learning, the organisation will discover, build and nurture its culture, work processes and procedures, systems and structures as well as its relationships. Through its learning processes, the organisation should be able to renew and revitalise these aspects of organisational life. From a learning orientation monitoring and evaluation have to enable the re-thinking of strategy and contribute towards the improvement of organisational maintenance tasks. When embedded in organisational learning processes, monitoring and evaluation should support the creation of resilient, creative and flexible organisations.

Learning lives in relationships

To genuinely learn from monitoring and evaluation, we have to be serious about learning – not learning as a process of transmitting facts and information, but transformative learning that can be imagined as a creative process. This kind of learning demands real time and quality process. At the same time, there has to be consciousness that learning does not belong to individuals, but to the various conversations of which they are a part within the organisation. In other words, learning has to live in the relationships between the people in an organisation. To fully experience learning as living in relationships requires a deep connection to one's own learning journey and demands that learning itself be seen as a process of monitoring. When you are connected to your own learning journey, you remain conscious of and are able to make meaning of those places your learning has brought you to and you can look back and appreciate that journey.



Courses for 2007



1. Principles, Strategies & Skills of Effective Developmental Practice

This five-day course brings and explores some of the core concepts, principles, strategies, processes and competencies of a developmental field-practice.

The course provides a process for participants to understand where the real work of facilitating development lies and what their own personal development challenges are in developing as a practitioner.

FEES: NON-RESIDENTIAL COURSE:

South African NGOs & CBOs – R1050

Non-South African NGOs/Government/Donors – R1600

Covers course and lunch/teas only.

2. Developmental Approaches and Skills for Group Facilitation

A five-day course for practitioners to learn and further explore essential facilitation concepts and skills for working developmentally with groups of people in small group, workshop or training course settings.

The course offers an opportunity to experience, critically examine, reflect on own practice and learn to practise a 'developmental' approach to facilitation.

FEES: NON-RESIDENTIAL COURSE:

South African NGOs & CBOs – R1050

Non-South African NGOs/Government/ Donors – R1600

Covers course and lunch/teas only.

3. Developmental Planning, Monitoring, Evaluation and Reporting

In this five-day course participants will explore and develop alternative approaches that enable planning, monitoring and evaluation processes to support rather than obstruct a developmental field practice – a PME approach beyond logframes.

For directors, programme/project managers and field-team leaders as well as donors who are looking for alternative ways to assist their partners to manage their practice.

This is not a basic skills training course in project management.

FEES:

NON-RESIDENTIAL COURSE:

South African NGOs & CBOs – R1050

Non-South African NGOs/Government/

Donors – R1600

Covers course and lunch/teas only.

RESIDENTIAL COURSE:

South African NGOs & CBOs – R2100

Non-South African NGOs/Government/

Donors – R3200

This includes all board and lodging, but excludes travel to Cape Town.

4. Managing People Developmentally

This five-day course explores the principles, values and practices of effective developmental supervision, mentoring and performance appraisals.

For those in team leadership, management or other supervisory positions who wish to mobilise and support the development of the unique talents and potential that each staff member brings to the work place.

FEES: NON-RESIDENTIAL COURSE:

South African NGOs & CBOs – R1050

Non-South African NGOs/Government/ Donors – R1600

Covers course and lunch/teas only.

5. Facilitating Development: from the inside out

This is a comprehensive programme for experienced development practitioners seeking to explore challenging new ways of understanding development and improving its practice and impact. The course is run over a block period of 5 weeks.

Experienced participants are drawn from diverse sectors and countries around the world which affords rich opportunities for sharing and learning.

FEES: The course fee is available on application.

During the 5 weeks there will be a three-week retreat, all costs of which are included in the course fee. Travel to Cape Town, and accommodation in Cape Town for the remaining two weeks, are the responsibility of the participants.

We suggest that organisations send more than one participant for mutual support for both the course and for implementing new practices in the field and organisation.

For more information and to obtain an application form, please contact Pauline Solomons or consult our website: www.cdra.org.za

Tel: +27 21 462 3902

Fax: +27 21 462 3918

Email: pauline@cdra.org.za

Books

Development Practitioners and Social Process: Artists of the invisible

By Allan Kaplan (Pluto Press) 2002

A radically new approach to the understanding of organisations and communities, and the practice of social development, this book teaches the reader to work from the inside out and so better practise the art of social intervention.

The Development Practitioners' Handbook

By Allan Kaplan (Pluto Press) 1996

Drawn from intensive reflection on years of practice in the development field, this book is about the essentials of development practice, and where the practitioner is best placed to pursue his or her work in a terrain that is highly contested and contentious.

Action Learning for Development: Use your experience to improve your effectiveness

By James Taylor, Dirk Marais, Allan Kaplan (Juta) 1997

This book is an introduction to Action Learning. It is a celebration of the validity of everyone's experience as a source of learning that can change the world. The authors, speaking as fieldworkers to other fieldworkers, invite you to join them on their journey of learning as they draw on many years of experience working in organisations in southern Africa.

Action Learning Series: Case studies and lessons from development practice

By James Taylor, Dirk Marais, Stephen Heyns (Juta) 1998 & 1999

These two volumes focus on four critical issues in development: the first volume on financial self-sustainability and community participation; the second volume on effective fieldwork and managing conflict. Drawn from the reflections of development practitioners with years of experience in the field, these books bring a clear focus to complex issues and provide important insights and a valuable resource for effective training and facilitating ongoing learning from experience.

CDRA DEVELOPMENT PRACTICE SERIES

Holding Infinity: Guiding social process – A workbook for development practitioners

By Sue Soal (CDRA) 2004

A journey through a developmental process for the reader to undertake with a speaking partner, this workbook is a response to the many requests we have received over the years for a 'toolkit' to make our exercises and methods transparent.

Organisations and Development: Towards building a practice

By James Taylor (CDRA) 2003

Organisations are living organisms made up of people, and need to be treated with caution and respect, particularly when using tools to measure their capacity. In the building of a truly developmental practice, practitioners need to take the time to work on their own development so that they are better equipped to intervene into the development of others. (This article was originally commissioned by the Swedish Mission Council.)

Positive Organisation: Living and working with the invisible impact of HIV/Aids – A resource for NGOs

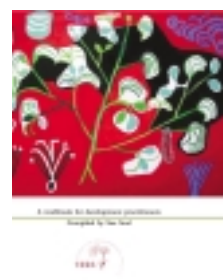
By Katherine Everett and Heather de Wet (CDRA) 2002

What will it take to build organisations that are robust enough to absorb the impacts of the HIV/Aids epidemic, while providing humane, stable workplaces? A practical resource for NGOs affected by the impact of HIV/Aids – which increasingly means all organisations.

OD Consultant Formation in Africa: Reflections from practice

By Sue Soal (CDRA), Rick James and Liz Goold (Intrac), and William Ogara (Corat Africa) 2001

Practitioners from CDRA, Intrac and Corat Africa share their critical reflections on OD consultant formation programmes that they have facilitated. Their conclusions have strategic and practical implications that will be of particular interest to donors.



Resource Centre

The CDRA resource centre offers a superb collection of books, journals, articles and videos on development-related themes. Visitors are welcome to come and browse and borrow. The resource centre is open on weekday mornings, but arrangements can be made for afternoon visitors.

Please phone the librarian, Siobhain Pothier, on (021) 462 3902 or email siobhain@cdra.org.za.

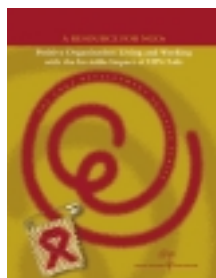
Available from our Resource Centre, as well as on our website:

ANNUAL REPORTS

- Engaging freedom's possibilities: Horizontal learning 2004/05
- Emergence: From the inside out 2003/4
- Seeking the Eye of the Needle 2002/3
- NGOs on the line 2001/02
- Measuring development: Holding infinity 2000/01
- The high road: Practice at the centre 1999/2000
- Development practitioners: Artists of the invisible 1998/99
- Crossroads: A development reading 1997/98
- Paradoxes of power 1996/97
- Shadows: The development sector face to face with itself 1995/96
- Capacity building: Myth or reality? 1994/95
- Exploring issues of consultancy and fieldwork 1993/94
- The developing of capacity 1992/93

Various articles and nuggets (unpolished writings from practice) are also available on the website.

Website: www.cdra.org.za



order form

Please make a copy of this order form if you don't want to cut up the annual report

Please tick the publication(s) you would like to buy and return (post/fax), with payment, to the address below:

BOOKS

- Development Practitioners and Social Process: Artists of the invisible (R130 / US\$25)
- The Development Practitioners' Handbook (R85 / US\$15)
- Action Learning for Development: Use your experience to improve your effectiveness OUT OF PRINT, BUT PHOTOCOPIES ARE AVAILABLE. (R40 / US\$7)

ACTION LEARNING SERIES: CASE STUDIES AND LESSONS FROM DEVELOPMENT PRACTICE

- Community participation / financial sustainability (R120 / US\$20)
- Effective fieldwork / managing conflict (R120 / US\$20)

THE CDRA DEVELOPMENT PRACTICE SERIES

- Holding infinity: Guiding social process (R130 / US\$25)
- Organisations and Development: Towards building a practice (R75 / US\$12)
- Positive Organisation: Living and working with the invisible impact of HIV/Aids (R100 / US\$16)
- OD Consultant Formation in Africa: Reflections from practice (R75 / US\$12)

Please note, prices are set in ZAR, US\$ price subject to currency fluctuation

ANNUAL REPORTS

Free, but postage will be charged. Please fill in which you would like to order.

POSTAGE COSTS: Within South Africa: R10 per book.

International: US\$5 per book

Name:

Organisation:

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Postal Code:

Telephone: Fax:

E-mail:

Cheque / postal order should be made payable to CDRA and mailed to: Community Development Resource Association, P O Box 221, Woodstock 7915, South Africa.

Tel: +27 (0) 21 462-3902 Fax +27 (0) 21 462-3918

What we did

The Centre: promoting dialogue, building community

DIALOGUE INITIATIVES:

We ran two Action Learning Groups, one on donor partnerships with specific reference to planning, monitoring, evaluation and reporting (with 25 people from Sweden and Africa) and the other linking this theme to organisational learning (with 12 people, from Britain and Africa).

An evaluation of the OD Event was conducted, and it was decided that after being a powerful presence in the life of its participants for the last 10 years, the time had come to bring closure to this event, and move on to something new.

PUBLICATIONS:

Three nuggets were published on our website. Two articles by CDRA practitioners were translated into French, one for use in Canada and the other in West Africa. Four articles were published in journals in Britain, Zimbabwe, Netherlands and South Africa.

WEBSITE:

Latest figures show that we have over 100 000 individual visits per year (around 300 per day). Visitors download over 30 000 articles per year.

RESOURCE CENTRE:

The resource centre continues to provide access to a unique range of resources.

ON CALL PRACTITIONER:

A practitioner was on call at the CDRA office for nine weeks of the year. In this time, they responded to ad hoc requests, were available to meet with visitors and to participate in activities.

NETWORKING:

A great deal of networking has occurred in the last year, with staff attending several learning events, indabas, conferences, workshops and visits to other centres.

RESEARCH:

An investigation into development practitioner training in South Africa, with the focus on tertiary institutions, has been initiated.



Consultancy: building the organisations that best support developmental practice

Consultancy, or organisational accompaniment, remains a very powerful and dominant force in shaping the identity and culture of the CDRA. In the past year we have provided services to approximately 40 organisations ranging from small local CBOs to big international institutions, national NGOs and those with sectoral specialisations.

Courses: strengthening the abilities of individuals to practise developmentally

Our courses are gaining increasing attention and maturing as a central service of CDRA as a centre. Information on forthcoming courses is included in this annual report. The courses we ran in the last year were:

FOUNDATIONS IN DEVELOPMENTAL PRACTICE –

Two courses were run, with a total of 38 participants.

FOUNDATION SKILLS IN DEVELOPMENTAL FACILITATION –

This course was designed and piloted with 10 participants.

LEADING DEVELOPMENTAL PRACTICE – Seven participants completed three one-week modules spread over four months.

DEVELOPMENTAL PLANNING, MONITORING AND EVALUATION – One five-day course was run for 19 participants.

DEVELOPMENTAL SUPERVISION – A five-day course was run with 15 participants.

FELLOWSHIP PROGRAMME – 11 participants completed this intensive, two-year programme.

Institutional development and sustainability programme:

HOLDING PRACTICE:

Homeweeks are the most important source of vitality and effectiveness in our practice. It is during homeweeks that new ideas, approaches and concepts are developed, space is made for individual review and learning, and it is the space where we can hold one another accountable. In the last year, 10 homeweeks were conducted.

GOVERNANCE:

Two full Board (including the AGM)-, three finance- and three executive committee meetings were held.





Who we are

BOARD

The Right Reverend Rubin Phillip (Chairperson)
 Di Oliver (Deputy Chairperson)
 Achmat Anthony
 Nomvula Dlamini
 Dr Farid Esack
 Rev Peter Grove
 Prof Pieter le Roux
 Sisasenkosi Maboza
 Judge Shehnaz Meer
 Mzwandile Msoki
 Judith Mtsewu
 James Taylor

DONORS

We are grateful to our donors, from whom we receive financial support :

Charles Stewart Mott Foundation
 Cordaid
 Evangelischer Entwicklungsdienste (EED)
 Humanistic Institute for Cooperation with Developing Countries (HIVOS)
 Swedish Mission Council



STANDING: Vernon Weitz, Lindani Mzamo, Rubert van Blerk, Shelley Arendse, Doug Reeler, Linda Njambatwa, James Taylor, Sheila Mana, Pauline Solomons and Nomvula Dlamini. SEATED: Siobhain Pothier, Sue Soal, Marlene Tromp and Velisa Maku. RIGHT: Desiree Paulsen and Sandra Hill.



STAFF

DEVELOPMENT PRACTITIONERS:

James Taylor (Director)

Nomvula Dlamini

Sue Soal

Doug Reeler

Desiree Paulsen

Rubert van Blerk

PRACTITIONER-IN-TRAINING:

Shelley Arendse

ORGANISATION MANAGER:

Vernon Weitz

SUPPORT STAFF:

Sheila Mana

Pauline Solomons

Linda Njambatwa

Marlene Tromp

Velisa Maku

RESOURCE LIBRARIAN:

Siobhain Pothier

FINANCE MANAGER:

Lindani Mzamo

DEVELOPMENT PRACTITIONER

RESEARCHER:

Sandra Hill

EXTERNAL CONSULTANTS

David Scott

Tony Saddington

We said a sad goodbye to Lungisa Huna, a fellow practitioner for the last five years. She has taken up the position of Director of Catholic Welfare and Development (rather ironically, since she came to us from there). Lungisa will be missed for her energy, keen questions, thoughtfulness, her warmth, big hugs and beautiful singing. We wish her well in her challenging new post but know that the relationship will continue.



Detailed Expenditure Statement

for the year ended 28 February 2006

FINANCIAL REVIEW AS AT 30 APRIL 2006

(extract from a report presented to the June staff meeting by the Financial Manager)

GENERAL

We are two months into the new year and quite a lot has happened. So far all programmes have run according to plan. At the beginning of each year we always talk about a budget deficit, 2006 is no exception. Although funding is tight out there CDRA is still one of the fortunate NGOs that are able to meet their budget requirements. Being in charge of the organisation's cash flow projections I have not experienced any problems or delays in getting funds already committed. For me it means there is something that we are doing right that we need to continue doing. Basically through our learning, we are able to submit our reports in time based on funders' needs.

THE AUDIT

The past two weeks have been very busy for the finance section of our organisation with the annual audit running. I am sure it would help us as an organisation to reflect on what happened seeing that this was a rather thorough exercise. Gobodo Incorporated were appointed as our new auditors this year. They came in with a different style of doing things. To me it was not a surprise because the new audit standards demand that. What is happening in organisations world wide has necessitated changes in reporting standards. Enron and Leisurennet are some of the examples. Again the number of fraud cases in the public sector has made it necessary for these kinds of audits. For example payrolls have included non-employees in some cases – that is why there was physical verification of each staff member this week. Also, all our furniture and equipment have been labelled. Unfortunately we have to live with this.

One of the major areas that were looked at is contracting. We need to tighten this area further. Each one of us has a policy document which must be adhered to at all times. Leave forms have to be filled in and approved accordingly. I must say because we do not deal with a lot of hard cash it is easy to monitor and inspect and again we encourage payments via direct deposits. All our transactions are segregated, which is the backbone of a proper internal control system. We need to re-look at how purchases are approved. There will be a new system of controlling the records of all our publications and this will be circulated soon.

I must take this opportunity to encourage all of us take to part in making sure we adhere to our internal control systems and policies. These kinds of audits are here to stay. This is what the world we live in demands. We therefore need not be threatened by it as long as we do the right thing supported by correct evidence.

Lindani
June'06

	Year ended 28 February 2006 R	Year ended 28 February 2005 R
Advertising (brochure invitation)	8,577	14,600
Annual report	95,750	80,568
Audit fees	74,473	80,700
Biennial Launch	16,819	–
Carrying group – OD event	7,710	11,117
Centre promotion	6,282	10,000
Centre visits	–	15,696
Editorial and writing assistance	–	17,024
Fee subsidy	–	20,200
Fees paid to associates	122,157	201,533
Fundraising	5,821	25,922
Governance	49,604	45,119
Holding practice	28,161	12,631
Home week attendance	10,074	27,985
Hospitality	25,280	–
Internal OD process	–	63,468
Insurance	39,590	–
Internal practitioner development	9,723	44,004
Legal expenses	11,303	–
Loss on disposal of investments	–	2,154
Loss on foreign exchange	6,532	27,092
Networking – local / overseas	12,187	79,995
OD event – evaluation	23,114	33,035
Organisational costs	951,310	615,391
Outside consultants	255,906	214,665
Outside trainers	–	29,773
Postage	13,428	1,556
Printing and stationery	46,593	3,349
Provision for bad debts	20,400	–
Publication and production	92,073	38,690
Repairs and maintenance	30,985	–
Report writing	6,000	12,640
Research	27,656	16,025
Resource material	29,128	23,409
Salaries	3,777,849	3,232,968
Subsidy – training courses	–	5,970
Training materials	15,340	13,400
Travel – local / overseas	68,234	42,070
Telephone and fax	73,357	–
Venue hire and accommodation – training courses ...	334,077	492,688
Website expenses	885	–
	6,296,378	5,555,437
FUNDED AS FOLLOWS		
CDRA	2,126,673	1,961,294
Charles Mott Foundation	252,800	289,928
Cordaid	874,962	824,939
EED	2,295,090	1,014,312
HIVOS	570,061	827,473
Open society foundation	–	325,000
IBIS	–	120,000
SIDA	176,792	192,491
	6,296,378	5,555,437

About the artist

PHOTOGRAPHS

Margaret Woermann
Rodger Bosch (staff photos)

DESIGN AND LAYOUT

Jenny Young

WRITING

Rubert van Blerk
Nomvula Dlamini
Judith Smith Vialva
Tanya Goldman
Judith Mtsewu

CERAMIC ARTIST

Lizo Nqoniso

POEM

Jeremy Cronin

GENERAL EDITORIAL

Sue Soal and Siobhain Pothier

Lizo Nqoniso was born in 1970 in Alice, Ciskei, and grew up in the village of Hala in the Eastern Cape. The youngest in a family of nine, he never attended school as his parents could not afford to pay school fees.

He was inspired by his older brother to work with clay. From an early age Lizo would fetch red clay from the bush and process it with his hands. His brother would make clay animals while Lizo watched and learnt from him. Then Lizo would sell the animals at the nearby tourist destinations in the area known as Hogsback.

Lizo's dream is to expand his business, and he would love to start teaching other people the art of working with clay.

Lizo can be contacted through Margaret or Cindy at Heartworks, 98 Kloof Street, Gardens, Cape Town.

Heartworks is a retailer committed to supporting and promoting local crafters, with a strong focus on recycled goods. They source craft from south of the Zambezi – from Namibia, Zimbabwe, Mozambique and South Africa. Tel/fax: +27 (21) 424 8419 Email: woermann@iafrica.com

