

Improving the BA How to Note

31st January 2013 SDC Learning Event

+ Objectives of the note

- To define and promote BA
- To use learning from SDC BA pilots and elsewhere for a tool to support SDC staff thinking about commissioning a BA:
 - Is it appropriate to commission a BA?
 - How do I manage the process?



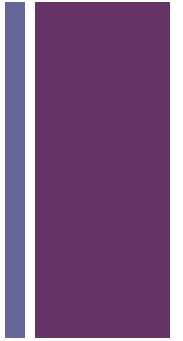
+ What we have agreed on

- Learning and responsiveness is a key BA aim, Other advantages e.g. empowerment etc.
- BA ideally is one element of a more participatory planning monitoring and evaluation culture, e.g. including beneficiary voices in planning and monitoring outputs. It can be a means, but for now
- The term 'Beneficiary Assessment' is associated with exploring beneficiary perceptions of outcomes and impacts and how and why they happened for the purpose of learning and making decisions to be more responsive within programme steering, and to inform future strategies. (This will require exploring perceptions of outputs)
- Appropriate for exploring perceptions on access to and quality of services and changes in institutional behaviour
- Broad principles participation, representativeness, inclusion, differentiation all appropriate
- Can be a complement to some other QA processes or fill gaps from other reviews
- Methodology will be very context specific



+ What we (QA) still needs to do

- Be clearer/make more prominent links with SDC corporate governance and accountability frameworks
- Develop a more nuanced BA typology in terms of what it is reasonable to expect in regard to complying with principles in different political historical contexts, with different levels of trust
- Define more clearly different types of beneficiaries and (non beneficiaries) and the kinds of roles they might play in different kinds of contexts
- Define clearly the level of interventions, domain etc
- Work more on thinking about when it is not appropriate to use BA?



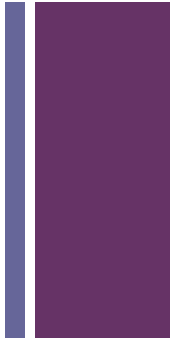
+ What we (QA) still needs to do

Be clearer about the most appropriate timing within SDC project cycles?

- Fine tune some of the criteria related to principles e.g. as per Sandra's presentation,
- Think more about how to approach issues of representativeness
- Integrate suggestions about building on existing cultural practices
- etc

+ What else now? – Group Work

- Does the general content of the HTN meet your needs?
- What is not clear? What is missing? Is the document too SDC centric?
- Do you agree with the advantages? Do you like the articulation of the main questions, page 5?
- How can we be clearer about roles of different actors – how can they be improved with reference to experience of BA, e.g. role of general versus national facilitators. BA facilitators need to have skills to do training on methodology, local knowledge but also confidence to challenge and hold SDC to account for being responsive? Can a national facilitator do both?



+ What else now – Group Work

- How do you go about finding the right citizen assessors?
- Beneficiary consolidation of findings and analysis – should external actors help at all? What are the pros and cons?
- Using BA findings to explore impact hypotheses and influence steering : how did that happen? Who was involved?
- Translation and communication of BA realities to the Bern project world. Who should do that? What writing style should they adopt?

