

# Evaluating

the Impacts of  
**Grassroots Development**

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## **UNIT TWO**

### **INDICATOR AND INFORMATION SUBSYSTEMS**



**Program for  
Building of  
Institutional  
Capacities**







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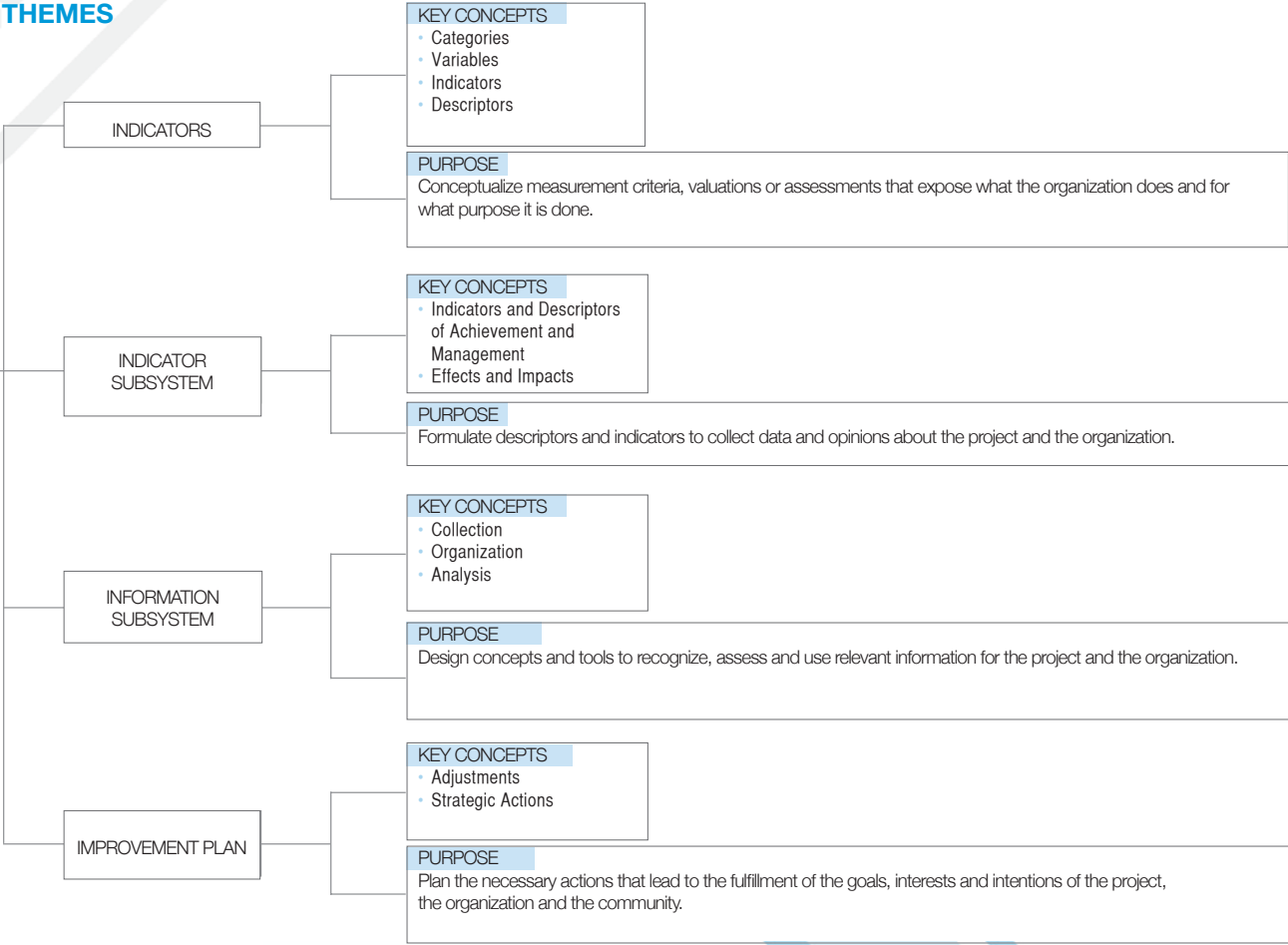
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**Summary Table**

**THEMES**

Indicator and Information Subsystems, as fundamental components of the evaluation system, facilitate the process of decision-making relative to projects and organizations.



**MOTIVATING QUESTION FOR THIS UNIT**  
**What information does your organization need and how do you obtain it?**



# THE INDICATORS



## 2.1.1 Indicator Subsystem

The design runs at least three main phases: The **first stage** involves the development, consultation and establishment of categories or themes. The **second stage** deals with the consultation and construction of variables for each of the categories, these variables are seen as the essential characteristics of each category, which are transformed to the extent that the organizations of **RedEAmérica** intervene. The **third stage** is responsible for the formulation of indicators, for which at least one valuation criteria for each specified variable must be established.

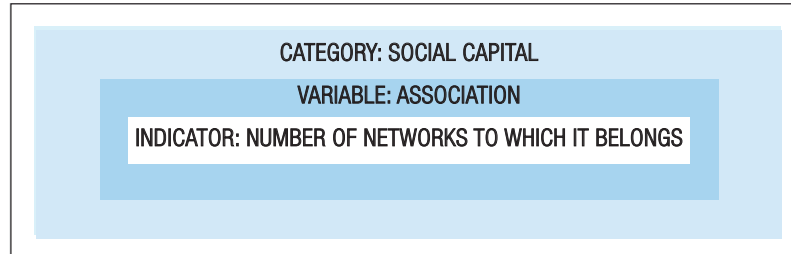


**MOTIVATING QUESTION**  
**How do you identify the state of a program or project?**



**FIGURE 2.1**

**The Cascade of evaluative criteria**  
 Examples from RedEAmérica



**BOX 2.1****Indicator Subsystem**

**IN THE INDICATOR SUBSYSTEM** AN INDICATOR IS UNDERSTOOD TO BE A CRITERION FOR MEASURING, VALUATING, ESTIMATING, CALCULATING OR APPRECIATING THE MERIT OF A PROJECT. THIS SUBSYSTEM CONSISTS OF THREE PHASES: CONSTRUCTION OF THEMES (OR CATEGORIES), CONSTRUCTION OF VARIABLES FOR EACH CATEGORY, AND FINALLY THE FORMULATION OF INDICATORS.

**2.1.2 Categories**

The ethical stance of RedEAmérica's member organizations with regards to grassroots development, or better yet development from the grassroots, reflects an understanding of and commitment to human wellbeing. Therefore, member organizations have agreed to devote all of their activities to four categories: poverty alleviation, expanding democracy, development of social capital, and development of collective capacities

**FIGURE 2.1****Categories**

Examples from RedEAmérica

**Alleviating Poverty**

- Poverty is understood as the lack of income, goods and services needed to live a dignified life; and a lack of opportunities, voice and power to decide how to live life.
- From a grassroots development perspective alleviating poverty is not limited to the lack of income, goods and services but also the lack of opportunities, voice and power.

**Expanding Democracy**

- Increase and improvement in the quality of public spaces and democratic values to guarantee inclusive and participatory practices.

**Building Social Capital**

- Institutions, organizations, attitudes, norms, values present in the interactions of individuals and organizations that facilitate collective action.

**Developing Collective Capacities**

- Abilities, skills and knowledge of the organizations that make it possible to contribute to poverty alleviation and expanding democracy.

The vertical logic – from top to bottom – indicates, in first instance, the ultimate logic of the projects that are co-financed and accompanied by the RedEAmérica. This is to say that poverty alleviation is an end that is promoted by greater degrees of democracy, made possible by higher degrees of social capital, and generated by a greater effectiveness in collective capacities constructed within organizations.

**BOX 2.2**

**Categories**

**CATEGORIES** ARE THE PERTINENT AND FUNDAMENTAL THEMES FOR ORGANIZATIONS THROUGH WHICH THEY CAN ESTABLISH WITH PRECISION THE ANSWER TO THE QUESTIONS OF: WHAT TO DO AND WHY TO DO IT.

**2.1.3 Variables**

According to the conception of **RedEAmérica** variables are the constitutive elements of each one of the established categories. They are modified due to the intervention that takes place with the grassroots development projects, which are accompanied and co-financed by foundations.

The following figure lists the variables that were agreed upon in the various workshops for the design of this proposal by the members of RedEAmérica for each one of the established categories:



**FIGURE 2.3**

**Categories and Variables**  
Examples from RedEAmérica

CATEGORIES				
	Collective Capacities	Social Capital	Expanding Democracy	Poverty Alleviation
VARIABLES	Planing, follow-through, evaluation and systematization	Associability	Democratic values	Social opportunities <ul style="list-style-type: none"> <li>• Health</li> <li>• Education</li> <li>• Housing</li> </ul>
	Anticipation and adaptation to change	Trust	Impact on the public	Economic opportunities <ul style="list-style-type: none"> <li>• Income</li> <li>• Ventures</li> </ul>
	Management and administration of resources	Cooperation		Cultural Development
	Consultation and negotiations	Solidarity		
	Disposition to the public	Norms and behaviors		



### 2.1.4 Indicators and Descriptors

For each one of the variables there are indicators (quantitative characteristics) and descriptors (qualitative characteristics). The system is organized into units of analysis that are constructed into three levels (macro, meso, micro) such as the following:

**FIGURE 2.4**

#### Levels – Units of Analysis<sup>1</sup>

		RedEAmérica	IAF
LEVELS	MACRO	The organization in the public and local	Regional and local society
	MESO	The organization in alliances and networks	Organization(s)
	MICRO	The organization, its beneficiaries and their	Beneficiaries and their families

**Indicators** are quantitative criteria that allow one to **measure** desired achievements and methods of achievement. In other frameworks these are referred to as objective or quantitative indicators. For **RedEAmérica** the use of indicators allows quantitative measurement that is very important in the evaluation system, especially when it comes to measuring progress in: tasks; activities; milestones; resources; and, time and budgets that are devoted to programs and projects. Indicators are also important to the various foundations, which have been making their own proposals and strategies for monitoring and evaluation.



#### BOX 2.3

#### Indicators

Example from RedEAmérica

CATEGORY: SOCIAL CAPITAL

VARIABLE: ASSOCIABILITY

INDICATORS:

- NUMBER OF ASSOCIATES OF THE ORGANIZATION
  - PERSONS (MEN & WOMEN)
  - ORGANIZATIONS
- NUMBER OF ALLIANCES IN WHICH THE ORGANIZATION PARTICIPATES
- NUMBER OF PUBLIC SPACES IN WHICH THE ORGANIZATION PARTICIPATES
- NUMBER OF NETWORKS IN WHICH THE ORGANIZATION PARTICIPATES

<sup>1</sup> Villar, Rodrigo. Levels of Intervention in Grassroots Development. Colección Construir Juntos. Cuadernillo 1, Program for Institutional Capacity Building. RedEAmérica, 2004.

**Descriptors** are qualitative criteria that allow the **appreciation** of the dynamics of the project, and in other manuals are defined as qualitative or subjective indicators.

The importance of the evaluation system for grassroots development projects that are accompanied and co-financed by foundations and members of RedEAmérica is its emphasis on the impact of collective achievements. For achievements that are generated by all members of the network. **Descriptors** are sometimes the most convenient concepts to refer to the qualities of the transformations in beneficiaries, organizations and contexts accomplished through projects for achievements that are generated by all members of the network.

Both evaluation criteria, indicators and descriptors, expose the two basic elements on which the indicator subsystem is constructed with their respective emphasis and possible uses, as exemplified in the following boxes:



#### BOX 2.4

### Descriptors

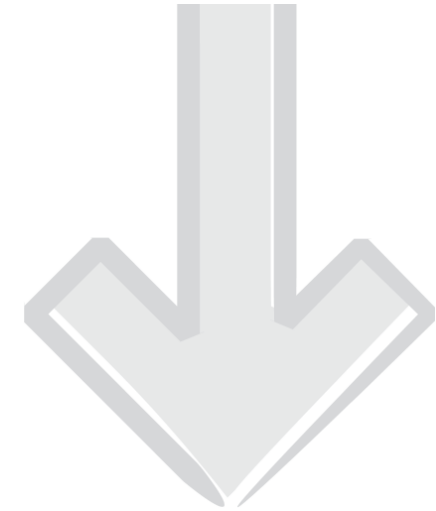
Example from RedEAmérica

CATEGORY: EXPANDING DEMOCRACY

VARIABLE: IMPACT ON THE PUBLIC

DESCRIPTORS:

- ORGANIZATION CONTRIBUTES TO THE CONSTRUCTION AND WIDENING OF THE SPACES FOR PUBLIC PARTICIPATION (OPTIMAL, ACCEPTABLE, DEFICIENT).
- ORGANIZATION INFLUENCES THE DESIGN OF PUBLIC POLICIES AND STATE STANDARDS (OPTIMAL, ACCEPTABLE, DEFICIENT).
- ORGANIZATION INFLUENCES THE ASSIGNMENT OF PUBLIC AND STATE RESOURCES (OPTIMAL, ACCEPTABLE, DEFICIENT).
- ORGANIZATION PROMOTES SOCIAL CONTROL OVER GOVERNMENT MANAGEMENT AND SPENDING (OPTIMAL, ACCEPTABLE, DEFICIENT).



#### EXERCISE 2.1

WHAT CATEGORIES AND WHAT VARIABLES COULD BE ESTABLISHED BASED ON THE MISSION OF YOUR ORGANIZATION?



# INDICATOR SUBSYSTEM AND TYPES OF INDICATORS

- Indicators and descriptors of management and accomplishment
- Effects and Impacts
- Summary of descriptors and indicators



**MOTIVATING QUESTION**

**What types of indicators make up an indicator subsystem?**

### 2.2.1 Indicators and descriptors of achievement and management

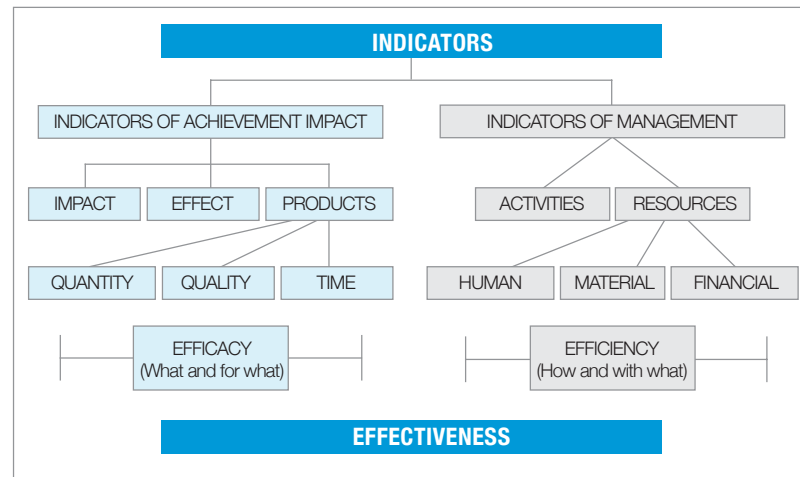
Both criteria for valuation, indicators as well as descriptors, expose two basic elements upon which the indicator subsystem is built.

The indicator subsystem is constructed from indicators and descriptors of achievement and management. The achievement ones measure what to achieve and the management ones measure how to do it.



**FIGURE 2.5**

**Types of Indicators**



When one desires to bring an idea or dream to term, the first thing that should be determined is what one wants to do and how it will be accomplished. For project managers the **what** and the **how** are fundamental axis to their principles and practices. Therefore, we suggest designing the indicator subsystem through two articulating axis or sets. The first axis would expose the **what** and **for what**, and the second would expose the **how** and **what with**.

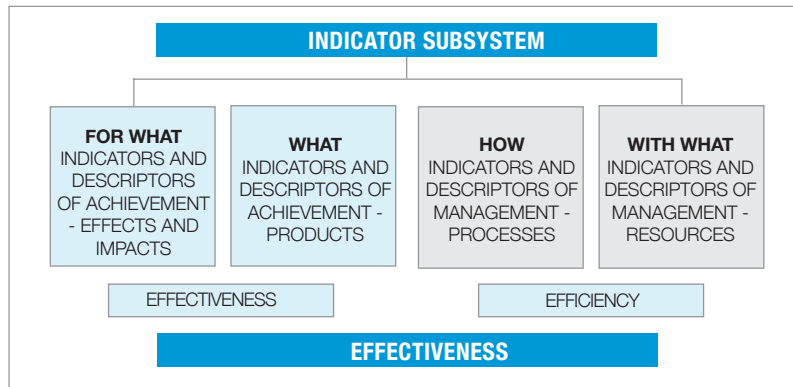
The first set has to do with effectiveness: "Do what needs to be done." That is to say, what we will do (the pacification), what we are doing (the follow-up), and what we have done (the evaluation). The second set refers to efficiency: "Doing things how they should be done." That is to say, how are we going to do it, how are we doing it, and how we did it.

In first instance the indicators and descriptors of achievement are conceived in three levels: products, effects and impacts. The indicators and descriptors of management then refer to activities and resources. From a systemic focus these two sets of indicators make up a control panel and also constitute a chain of indicators. In other words: there are resources to realize activities; these activities generate a product; this product has an effect; and, this effect has an impact. From a lineal perspective they form a chain of indicators, or from a structural point of view they form an interrelated system.

The indicators for projects are a control panel that permanently shows the state of each one of the variables that you want to evaluate. Since we are talking about a control panel, indicators cannot be observed in isolation. Decisions must be taken in accordance with the totality of the control panel, which as was previously explained, are a set of indicators whose purpose is to collect sufficient and relevant information so that well informed project decisions can be taken.

**FIGURE 2.6**

**Effectiveness & Efficiency**



**BOX 2.5**

**Types of Indicators**

- THE **INDICATORS OF ACHIEVEMENT** DEFINE WHAT TO DO AND WHY TO DO IT.
- THE **INDICATORS OF MANAGEMENT** DEFINE HOW ITS DONE AND WITH WHAT RESOURCES IT IS OBTAINED.

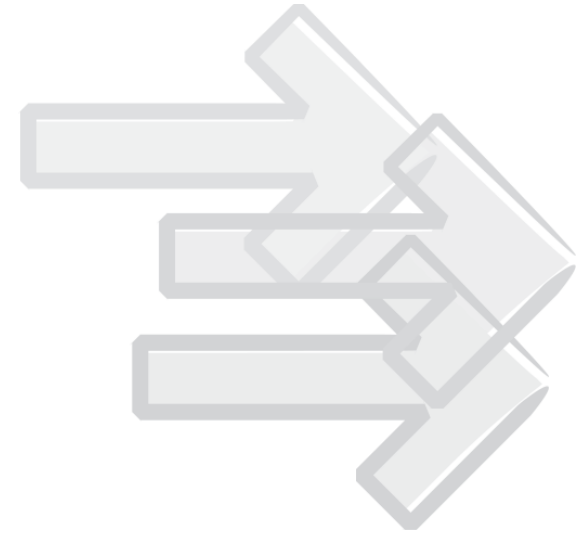
## 2.2.2 Effects and Impacts

This **Evaluation System Manual** of grassroots development is focused on the first phase of valuating effects and impacts. It serves as an addition and complement to the advanced evaluation systems already collected by the multiple corporate foundations and corporations recognized by **RedEAmérica** which specifically reference resources, processes and products of the different types of indicators previously described.

To measure effects and impacts, the “for what,” requires methodological proposals that are essentially qualitative, composed of descriptors and subjective indicators. Quantitative indicators that can also help to specify the effects and impacts must also complement them. Combined, these factors expose the transformations for which the organization, its programs and its projects are working, such as those collected in the summary table of the indicator subsystem which will be shown below.

Due to the character of the specific indicators of the analysis of impacts, the majority of the system designed up to now is based on descriptors in a complimentary conjunction with some quantitative indicators when these were absolutely necessary.

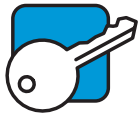
The descriptors or subjective indicators are manifested in scales, which can be measured in grades or levels. For RedEAmérica's evaluation system we combine a scale of grades and levels where we establish the minimum requirements. For each one we develop a scale that has three levels that reflect the baseline of a situation all the way to the goals and desired outcomes in each one of the established categories. These allow one to qualify each level in terms of: optimal, acceptable and deficient; always, sometimes or never; 1 – 2 – 3; and, green, yellow or red. (Formats 1 and 2)



### EXERCISE 2.2

**WHICH COULD BE INDICATORS AND DESCRIPTORS OF SOME OF THE STRATEGIC VARIABLES FOR YOUR ORGANIZATION?**





**Indicator subsystem**

Summary Table

Continues on next page

Category 1 Collective Capacities	Category 2 Social Capital	Category 3 Expanding Democracy	Category 4 Poverty Alleviation
<b>Variable 1.1</b> Pacification, follow-up, evaluation and systematization	<b>Variable 2.1</b> Associability	<b>Variable 3.1</b> Democratic Values	<b>Variable 4.1</b> Social Opportunities - Education
<b>Descriptors/Indicators</b>	<b>Descriptors/Indicators</b>	<b>Descriptors/Indicators</b>	<b>Descriptors/Indicators</b>
1.1.1 Collects and uses information about environment. 1.1.2 Identifies their strengths and weaknesses. 1.1.3 Formulates plans, programs and projects. 1.1.4 Applies concepts, methods, instruments and indicators for follow-up and evaluation. 1.1.5 Spaces for analysis are shared. 1.1.6 Learns from own experiences and those of others.	2.1.1 Number of associates (people). 2.1.2 Percentage of women associates. 2.1.3 Number of networks that the organization participates in. 2.1.4 Number of alliances where the organization participates in. 2.1.5 Number of public spaces in which the organization participates.	3.1.1 The general, community, social interest or "common good" prevails over the interest of the organization and individuals. 3.1.2 Acts transparently. 3.1.3 The relationships are based on respect for differences. 3.1.4 Acts anonymously. 3.1.5 Contributes capacities and knowledge to act democratically.	4.1.1 Percentage of families to which access to the educational was returned or improved. 4.1.2 Percentage of families that utilize the knowledge and skills generated by the organization's projects.
<b>Variable 1.2</b> Anticipation and adaptation to change	<b>Variable 2.2</b> Confidence		<b>Variable 4.2</b> Social Opportunities - Health
1.2.1 Take advantage of the opportunities in accordance with the organization's mission. 1.2.2 Learns from other organizations and adjusts structures, strategies and methods.	2.2.1 Degrees of confidence between members, partners and associates. 2.2.2 Degree of confidence of others in the organization.		4.2.1 Percentage of families that have had children affected by acute diarrheal diseases. 4.2.2 Percentage of families that have had children affected by acute respiratory infections. 4.2.3 Percentage of families with access to medical insurance (primary, private or public). 4.2.4 Percentage of families that utilize medical insurance (primary, private or public).
<b>Variable 1.3</b> Management and administration of resources	<b>Variable 2.3</b> Cooperation		<b>Variable 4.3</b> Social Opportunities - Housing
1.3.1 Generates own revenue. 1.3.2 Has access to different sources of financing. 1.3.3 Develops a budget. 1.3.4 Has an accounting system. 1.3.5 Analyses financial statements.	2.3.1 Works jointly for the realization of common purposes.		4.3.1 Percentage of families that acquire their own housing. 4.3.2 Percentage of families that improved their housing (materials, remodeling, amplification and construction).



Continues from last page



### Indicator Subsystem

Summary Table

Category 1 Collective Capacities	Category 2 Social Capital	Category 3 Expanding Democracy	Category 4 Poverty Alleviation
<b>Variable 1.3</b> Management and Administration of Resources	<b>Variable 2.4</b> Solidarity	<b>Variable 3.2</b> Impact on Public Affairs	<b>Variable 4.4</b> Social Opportunities - Assets
<b>Descriptors/Indicators</b>	<b>Descriptors/Indicators</b>	<b>Descriptors/Indicators</b>	<b>Descriptors/Indicators</b>
1.3.6 Communicates with transparency in the financial information of the public with which the organization interacts. 1.3.7 Applies strategies for developing capacities in its human resources.	2.4.1 Degree of solidarity. 2.4.2 Mobilizes resources to address causes of others. 2.4.3 Number of volunteers that the organization mobilizes around its mission. 2.4.4 Percentage of women that the organization mobilizes around its mission.	3.2.1 Contributes to the construction and amplification of spaces for public participation. 3.2.2 Influences the design of state public policies and norms. 3.2.3 Influences the assignment of state public resources. 3.2.4 Exercises social control over government spending and management.	4.4.1 Percentage of families that increased their assets (fixed or liquid) in their home, business and or property.
<b>Variable 1.4</b> Concentration and Negotiation	<b>Variable 2.5</b> Norms and Behaviors		<b>Variable 4.5</b> Cultural Development
1.4.1 Accords are constructed through participative methods. 1.4.2 Constructive leadership prevails. 1.4.3 Conflicts are resolved through dialogue.	2.5.1 The rules of the game are constructed collectively. 2.5.2 The organization behaves in accordance with the agreed upon rules.		4.5.1 Percentage of families that acquire their own housing. 4.5.2 Percentage of families that improved their housing (materials, remodeling, amplification and construction). 4.5.3 Percentage of families with a better sense of regional cultural identity. 4.5.4 Percentage of families that make better use of their free time.
<b>Variable 1.5</b> Public Disposition			
1.5.1 Manages critical information about the agenda, the actors and the public policies relevant to its mission. 1.5.2 The organization has knowledge and access about forms and space for public participation.			

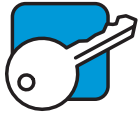
### 2.2.3 Summary Sheet for Descriptors / Indicators

The indicator subsystem functions by permitting the establishment of the baseline or current situation for: categories, variables, descriptors and indicators. To accomplish this on the following page we present [Format One \(Summary Sheet for Descriptors / Indicators\)](#) along with a corresponding guide for organizations on how to apply it. In Annex One we provide the formats that are pertinent to this manual and we also establish a glossary to clarify with greater rigor the fundamental concepts according to [RedEAmérica](#).

The Summary Sheet for Descriptors / Indicators (Format One) establishes a base line for the initial situation when determined during the planning phase of a project (Ex-ante evaluation). Conversely, this tool can also be employed at any moment in the lifecycle of the project by examining some of the basic background information about the organization and the project at first, and then later officially determining the current level for the descriptors and the baseline of the indicators.

The first three categories: 1) Collective Capacities; 2) Social Capital; and, 3) Expanding Democracy; must each be classified (optimal, acceptable or deficient) for each (micro, meso and macro) level through a process of consensus building that brings together members of the organization's board of directors, the relevant project staff, associates, community members and the accompanying foundation.

With category 4, Poverty Alleviation, the units of analysis are the homes of the beneficiaries of the project. This means that there must be multiple strategies for collecting the necessary data according to the culture and societal context of the beneficiaries. The information is obtainable through household surveys specified in Format Two, which can be used equally as an interview guide as well being based on participant observation proposals.



**SUMMARY SHEET FOR DESCRIPTORS / INDICATORS**

**BACKGROUND**

FOUNDATION: \_\_\_\_\_

ORGANIZATION: \_\_\_\_\_ PROJECT NAME: \_\_\_\_\_

METHOD OF RECOLLECTION: \_\_\_\_\_

FREQUENCY: \_\_\_\_\_

PERSON RESPONSIBLE FOR DATA COLLECTION: \_\_\_\_\_

PERSON RESPONSIBLE FOR DESCRIPTOR / INDICATOR: \_\_\_\_\_

**DATA**

MONTH DAY YEAR

CATEGORY 1: \_\_\_\_\_ UNIT OF ANALYSIS: \_\_\_\_\_

VARIABLE 1.1: \_\_\_\_\_

CONCEPT: \_\_\_\_\_

**DESCRIPTORS**

1.1.1 NAME OF DESCRIPTOR: \_\_\_\_\_

<i>At Micro Level</i>	Optimal	Acceptable	Deficient	Why: _____
<i>At Meso Level</i>	Optimal	Acceptable	Deficient	Why: _____
<i>At Macro Level</i>	Optimal	Acceptable	Deficient	Why: _____

EVIDENCE: \_\_\_\_\_

**INDICATORS**

1.1.2 NAME OF INDICATOR: \_\_\_\_\_

<i>Micro Level:</i>	Baseline: _____
<i>Meso Level:</i>	Baseline: _____
<i>Macro Level:</i>	Baseline: _____

EVIDENCE: \_\_\_\_\_





**HOUSEHOLD SURVEY / CATEGORY 4 / POVERTY ALLEVIATION**

REGISTRATION SHEET

PROJECT NAME:

ORGANIZATION:

SURVEY #				
Family / Beneficiary				
4.1.1	YES	NO		
4.1.2	MAN	ALWAYS	SOMETIMES	NEVER
	WOMAN	ALWAYS	SOMETIMES	NEVER
4.2.1	MICRO BASELINE:			
	MESO BASELINE:			
4.2.2	YES	NO		
4.2.3	YES	NO		
4.2.4	YES	NO		
4.3.1	YES	NO		
4.3.2	YES	NO		
4.4.1	OPTIMAL	ACCEPTABLE	DEFICIENT	
4.4.2	MAN	HIGH	MEDIUM	LOW
	WOMAN	HIGH	MEDIUM	LOW
4.4.3	MAN	HIGH	MEDIUM	LOW
	WOMAN	HIGH	MEDIUM	LOW
4.4.4	OPTIMAL	ACCEPTABLE	DEFICIENT	

SURVEY #				
Family / Beneficiary				
4.1.1	YES	NO		
4.1.2	MAN	ALWAYS	SOMETIMES	NEVER
	WOMAN	ALWAYS	SOMETIMES	NEVER
4.2.1	MICRO BASELINE:			
	MESO BASELINE:			
4.2.2	YES	NO		
4.2.3	YES	NO		
4.2.4	YES	NO		
4.3.1	YES	NO		
4.3.2	YES	NO		
4.4.1	OPTIMAL	ACCEPTABLE	DEFICIENT	
4.4.2	MAN	HIGH	MEDIUM	LOW
	WOMAN	HIGH	MEDIUM	LOW
4.4.3	MAN	HIGH	MEDIUM	LOW
	WOMAN	HIGH	MEDIUM	LOW
4.4.4	OPTIMAL	ACCEPTABLE	DEFICIENT	

SURVEY #				
Family / Beneficiary				
4.1.1	YES	NO		
4.1.2	MAN	ALWAYS	SOMETIMES	NEVER
	WOMAN	ALWAYS	SOMETIMES	NEVER
4.2.1	MICRO BASELINE:			
	MESO BASELINE:			
4.2.2	YES	NO		
4.2.3	YES	NO		
4.2.4	YES	NO		
4.3.1	YES	NO		
4.3.2	YES	NO		
4.4.1	OPTIMAL	ACCEPTABLE	DEFICIENT	
4.4.2	MAN	HIGH	MEDIUM	LOW
	WOMAN	HIGH	MEDIUM	LOW
4.4.3	MAN	HIGH	MEDIUM	LOW
	WOMAN	HIGH	MEDIUM	LOW
4.4.4	OPTIMAL	ACCEPTABLE	DEFICIENT	



## GUIDE TO FORMATS ONE & TWO

### Summary Sheet for Descriptors / Indicators

**OBJECTIVE:** Register the basic background information of the descriptors / indicators agreed upon by RedEAmérica for each one of the variables.

The basic evaluation team charged with filling out Format One will include the board of directors of the organization accompanied by at least one consultant of the respective foundation. Together they will determine the answers to the questions posed in Format One.

According to the experience of organizations in Cali, Colombia and Cordoba, Argentina for the application of this format we suggest that it be filled out through one six hour workshop or two three hour workshops. During the first part of the workshop(s) the matters relative to collective capacities are determined, then the second part concentrates on social capital and expanding democracy. The matters relative to poverty alleviation require a separate methodology (household surveys), which necessitates responses from the direct beneficiaries and their families.

## GUIDE FOR FILLING OUT

### Format One. Background

- **FOUNDATION:** Write the name of the private sector foundation from **RedEAmérica** that accompanies and co-finances the project.
- **ORGANIZATION:** Register the name of the organization responsible for the project.
- **PROJECT NAME:** Write the name of the project that is being carried out by the organization.
- **METHOD OF RECOLLECTION:** The evaluating team has the responsibility of promoting the application of the indicator subsystem (summary sheet for the descriptor) for which they convene the workshop where the first rating or baseline for the descriptors is determined in each one of the established levels (micro, meso and macro).

To better understand the proposed levels we recommend referring to number 2.1.4 as well as Booklet 2 from the series for Jointly Building series of the Program for Construction of Institutional Capacities from RedEAmérica. At the micro level the analysis is centered on the internal affairs of the organization. In turn at the meso level the analysis is focused on the relationship and participation of the organization in alliances or networks with other organizations that have similar goals. At the macro level the analysis is focused on the organization's relationship and participation in public life as defined by proposals, instances and committees promoted by the government and public institutions.

The reflection and analysis carried out in the meetings with the relevant actors of the project and expressed in the formats should always be backed by corresponding evidence. Such evidence may include records, reports, documents, testimony, memories, minutes, projects and contracts that serve to justify the grades given to the descriptors and the values given to the indicators.

In the evaluation system proposed here, the evidence serves as a guarantee of the quality of the subjective findings which the participants of the evaluation and diagnosis workshops may provide through the process.

- **FREQUENCY:** This item refers to the number of times that information must be collected. During the first instance it is recommended to collect information at least once a year to ascertain the dynamics of the grades given as the baseline.
- **PERSON RESPONSIBLE FOR DATA COLLECTION:** State the name of the individual responsible for guiding the application and registration of the format.
- **PERSON RESPONSIBLE FOR DESCRIPTOR / INDICATOR:** State the name of the individual directly responsible for the project.

## GUIDE FOR FILLING OUT

## Format One. Descriptors

- **DATE:** State the month, day and year in which the format is filled out.
- **CATEGORY:** State which of the categories will be evaluated in terms of impacts for RedEAmérica: collective capacities, social capital, expanding democracy or poverty alleviation.
- **UNITS OF ANALYSIS:** Is the specific instance or group of instances around which the evaluation is centered. In the system of evaluation for collective capacities, social capital and expanding democracy the unit of analysis is the organizations. While for the category of poverty alleviation the unit of analysis are the households of the beneficiaries (household surveys).
- **VARIABLES:** State the different variables established by the member organizations of RedEAmérica for each category.
- **CONCEPT:** Is a strategic framework that delimits the significance of each variable and is included in each format according to agreements and consensus established by the organizations of RedEAmérica.
- **DESCRIPTORS:** Each format contains the descriptors that correspond to each one of the variables which have been agreed upon and approved by RedEAmérica.

At this point in the format, relative to the descriptors, begins the collection of the opinions of the agents relevant to the organization that carries out the project. They grade the current state of each descriptor in their organization to grant a value according to the formats: optimal, acceptable and deficient; always, sometimes or never; 1 – 2 – 3; and, green, yellow or red. One of the previous values should be stated for each one of the descriptors so that the organization's baseline is present. It's important to remember the role that each piece of evidence plays in supporting the grades given.

- **WHY:** State why each grade is given for each descriptor in the organization, why each descriptor is believed to be at that level.
- **EVIDENCE:** The group that evaluates and registers the format must also provide evidence for each of the grades given to each descriptor by providing existing documents and other verifying facts. For the methodology of RedEAmérica the evidence becomes a fundamental component of the evaluation proposal since through it one determines precisely what justification can be provided for the grades given to each descriptor.



## GUIDE FOR FILLING OUT

## Format One. Indicators

- At this point in the format one begins to collect the facts related to each one of the established indicators, be they secondary sources or household surveys.
- The format establishes three baseline ratings that apply for the levels: **micro** (inside the organization), **meso** (networks and alliances), and **macro** (public spaces where the organization participates). Even though in the formats the macro level is presented first, at the top of the list, the analysis should be conducted from the bottom (micro level, the organization, its beneficiaries and families), to the top of the list, (meso and then macro levels).
- **EVIDENCE:** The group that evaluates and registers the format must also provide evidence for each of the grades given to each descriptor by providing existing documents and other verifying facts.

## GUIDE FOR FILLING OUT

## Format Two. Summary Sheet

Format Two (Summary Sheet) is only used to state the facts about category 4: poverty alleviation. This is done by applying the household survey to at least 30% of the families of the beneficiaries of the project promoted by the organization and accompanied by a member foundation of **RedEAmérica**. At the same time this Format Summary Sheet can be used when the information is collected through different methodological proposals, particularly participant observation and interviews.

As was previously established, the first three categories (collective capacities, social capital and expanding democracy) were looked at from within the organization (micro level), from the networks and alliances of the organization (meso level), and from the public incidence of the organization particularly at the local level (macro level).

In this fourth category the analysis is not done around the organization, instead it is done around the families of the beneficiaries. In the logic of RedEAmérica, capacity construction, increasing of social capital and expanding democracy are pertinent to the extent that they contribute to the poverty alleviation of the beneficiaries and their families. In the first case those giving the grades should be the board of directors of the organization, while in the second instance of the household survey the ones giving responses about their perceived effectiveness of the project should be the beneficiaries and their families.

In order for the household survey to obtain the best results possible it is necessary to select and train the surveyors, who should live in the community and have participated in the surveys and or previous processes of evaluation. The surveyor should have a profile that allows the greatest respect and best human treatment possible for the surveyed families. In the process of validation you may pay two dollars per survey and three dollars per day for travel expenses. It is possible to conduct one survey per family in less than an hour.

Once the surveyors are selected and trained the organization should schedule a meeting with associates to discuss the evaluation system that they are applying, in particular the household survey and its purpose. At the same time it is necessary to communicate to the beneficiaries of the organization who will be surveying them to establish appointments with specific times and dates.

It is also possible to do an ex post evaluation and recollection of information about a project through a client satisfaction survey or a project conclusion report with the purpose of verifying the impact of having participated in the programs of the Foundations. The participant observation of the consultants in their daily work as well as through interviews to beneficiaries and their families can be oriented by the guide and registered in Format Two – Summary Sheet.

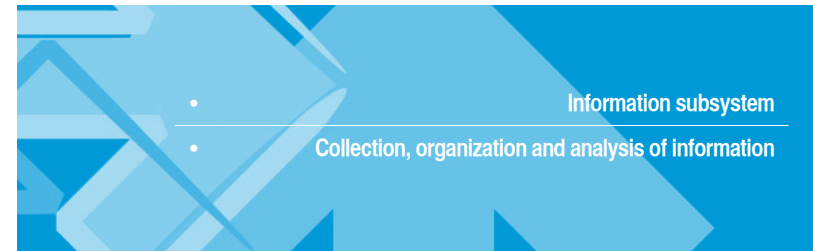
## EXERCISE 2.3

HOW DO YOU DISTINGUISH THE INDICATORS OF ACHIEVEMENT FROM THE INDICATORS OF MANAGEMENT IN ONE OF YOUR ORGANIZATION'S PROJECTS?

HOW WOULD YOUR ORGANIZATION CARRY OUT A CONVERSATION ABOUT THE DIFFERENCES BETWEEN INDICATORS AND DESCRIPTORS?



## SUBSYSTEM OF INFORMATION



### 2.3.1 Information Subsystem

Through the indicator subsystem we concentrated on what information is required – categories and variables – and how to determine the values for them. From this we establish a baseline or initial situation, that is to say a reference value for the variable. Each time that the achievements and advancements are compared, they must be contrasted with the established baseline. That is precisely the final result of the indicator subsystem with its indicator summary sheet, which permits one to record what has been previously described.

In the information subsystem the information makes reference to opinions and facts that have been organized in a significant way. Opinions and facts as raw data are simply unanalyzed values. Useful information on the other hand is made up of opinions and facts that have been organized and analyzed in a significant way.

Once the first facts of the evaluation system have been collected, they should be converted into relevant information for the carrying out and evaluation of the project in the framework of project management and the social execution of the project. This is how to overcome and surpass the porous border that separates the indicator subsystem from the information subsystem.

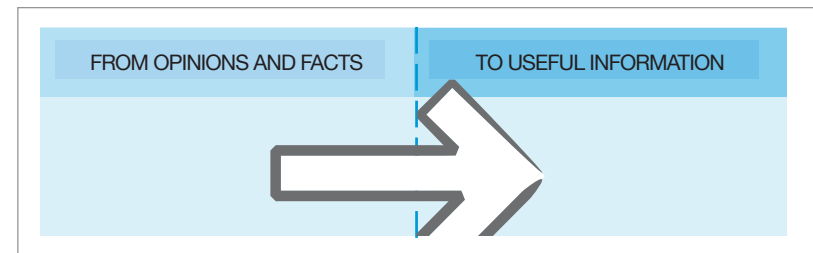


#### MOTIVATING QUESTION

**How do you organize relevant and useful information for the organization?**

FIGURE 2.7

#### Fact and Information





This information subsystem has the essential function of recollection, organization and analysis of opinions and facts in order to convert them into useful information for decision-making within the organization.

Through the analysis of situations and prospects the information subsystem facilitates the execution of planning (baseline and goals), follow-through and evaluation (processes, results and impacts).

### BOX 2.6

## Information Subsystem

**THE INFORMATION SUBSYSTEM** IS STRUCTURED AROUND THREE BASIC ELEMENTS:

- GATHERING INFORMATION
- ORGANIZING INFORMATION
- ANALYZING INFORMATION

Organizations should take their decisions based on the information that they collect and analyze. The more relevant and useful information that organizations can count on the more they will be able to think clearly and act effectively. This will help the organizations be more capable of making adjustments and reforms according to the ever-changing circumstances of the medium in which the organizations act

The information subsystem contributes to generating pertinent evidence that allows the organization to know, in a consistent way, the progress of the program and or project that is being accompanied. It organizes and analyzes the opinions and facts that help to expose and explain advances and results.

### BOX 2.7

## Information Subsystem

### Objective

**THE INFORMATION SUBSYSTEM** HAS THE OBJECTIVE OF COLLECTING, ORGANIZING AND ANALYZING SIGNIFICANT INFORMATION FOR THE ORGANIZATION IN SUCH A WAY AS TO FACILITATE THE EXECUTION OF PLANNING, FOLLOW-THROUGH AND EVALUATION.



### 2.3.2 Collection and organization of information

The RedEAmérica system of evaluation utilizes formats three and four as self-evaluation tables. In one page the tables state the opinions and facts about the values for the established indicators and descriptors as currently being assigned or previously designated.

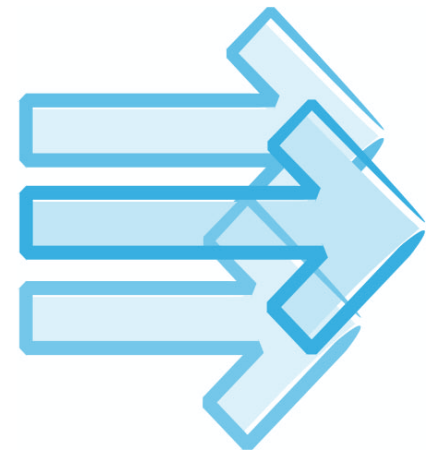
Transfer each one of the established descriptors and indicators in formats one and two – summary sheet for descriptors / indicators – along with their corresponding base line values to formats three and four.

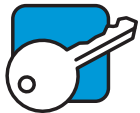
The evaluation group must organize another round of workshops or roundtable discussions that again bring together the relevant actors of the organization and project. Their purpose is to determine the goals that need to be reached in the categories of collective capacities, social capital, expanding democracy and poverty alleviation. In doing this they should also establish expected results, which in the case of the indicators reflect quantitative values that must be accomplished by a specified date.

In the case of the descriptors, the goals need to reflect the level which the organization must accomplish, in each one of the established categories, in the next 12 months or another appropriate timeframe.

This exercise is initiated through the usage of the self-evaluation table, which establishes the goals that need to be accomplished, and is completed with the establishment of the baselines and goals at the end of the diagnostic and planning cycle of the project. At this point begins the project execution throughout which the organization will register its accomplishments in terms of their compliance with the timeframes and budget that were established to obtain them.

The following pages present the self-evaluation tables for descriptors and indicators, each with a corresponding guide for filling in the formats.





**SELF-EVALUATION TABLE**

DESCRIPTORS

MONTH	DAY	YEAR
-------	-----	------

FOUNDATION:

ORGANIZATION: PROJECT NAME:

CATEGORY: UNIT OF ANALYSIS:

VARIABLE	DESCRIPTORS	BASELINE	GOAL	ACHIEVEMENT (TO DATE)

FACILITATORS

OBSTACLES





**SELF-EVALUATION TABLE**

DESCRIPTORS

MONTH 09	DAY 27	YEAR 2004
-------------	-----------	--------------

FOUNDATION: xxxx

ORGANIZATION: xxxx PROJECT NAME: xxxx

CATEGORY: Expanding Democracy UNIT OF ANALYSIS: The Organization

VARIABLE	DESCRIPTORS	BASELINE	GOAL	ACHIEVEMENT (TO DATE)
Participation in Public Sphere	Contributes to the construction and widening of the spaces for public participation.	Acceptable	Optimal – 06/06	
	Influences the design of state public policies.	Deficient	Acceptable – 06/06	
	Influences the assignment of state public resources.	Deficient	Acceptable – 06/06	
	Exercises social control over government management and expenditures	Acceptable	Optimal – 06/06	

FACILITATORS

OBSTACLES

## GUIDE FOR FILLING OUT

## Format Three. Self-Evaluation Table – Descriptors

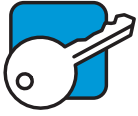
- **OBJECTIVE:** Once the baseline is established in the descriptor summary sheet (first workshop), a second workshop is held which utilizes the third instrument (Self-Evaluation Table – Descriptors) and focuses on planning. During this workshop the board of directors broadened by the company of a consultant establish the baseline value for each variable, and then determine the desired value for each variable as the planned goal.

The self-evaluation table should be used once per semester, or at least once per year, to register the value of the variables as obtained so far (accomplishment to date). It also records the analysis that describes and interprets the facilitators and obstacles of the process, which in just one sheet allow one to have a picture of the dynamics of a project in relation to each of the established variables.

The software application that accompanies this manual is designed such that the fundamental data from the self-evaluation table, both indicators and descriptors, can be produced automatically from the indicator summary sheet. The data is generated by registering the baselines in format one and the household surveys, and subsequently applying them in the planning workshop as the goals and targets are established. The software will register and process the achievement to date and the analysis of the facilitators and obstacles so that the organization and the RedEAmérica foundation and the community can permanently retain and retrieve the current state of the project for both learning and decision making purposes.

- **FOUNDATION:** State the name of the RedEAmérica foundation that funds and accompanies the project.
- **DATE:** State the month, day and year in which the format is filled out.
- **ORGANIZATION:** State the name of the organization responsible for the project.
- **PROJECT NAME:** State the name of the project that the organization is carrying out.
- **CATEGORY:** State which of the categories will be evaluated for its impact at the level of RedEAmérica: Collective Capacities, Social Capital, Expanding Democracy or Poverty Alleviation.
- **UNIT OF ANALYSIS:** State the instance or group around which the evaluation is centered. In this evaluation system the units of analysis are the organizations for the categories of collective capacities, social capital and expanding democracy. Meanwhile for the category of poverty alleviation the units of analysis are the “beneficiary households” (based on the household surveys).
- **VARIABLE:** State from the descriptor summary sheet which variable will be evaluated and updated.
- **DESCRIPTORS:** State from the descriptor summary sheet which variable will be evaluated and updated.
- **BASE LINE:** State the baseline that was obtained in the descriptor summary sheet format one, that is to say at which level are each of the established descriptors.
- **GOAL:** Once the baseline has been determined the goal can be established, which is the desired level or situation that must be attained by a specified date.
- **ACHIEVEMENT:** Once the project enters execution phase and the baselines and goals have been established, then the self-evaluation table allows one to register the advances and achievements of the goals as well as the dates of completion.
- **FACILITATORS:** At this point in which the system of evaluation has registered the first accomplishments through the information subsystem, it is required that the board of directors organize a workshop to analyze the facts that are generated through the system in the framework of facilitators and obstacles. In the case of the facilitators the group should state the reasons why the achievements were possible.
- **OBSTACLES:** State the factors that impeded the achievement of the established goals.





**SELF-EVALUATION TABLE**

INDICATORS

MONTH	DAY	YEAR
-------	-----	------

FOUNDATION:

ORGANIZATION: PROJECT NAME:

CATEGORY: UNIT OF ANALYSIS:

INDICATOR	BASELINE	GOAL		ACHIEVEMENT TO DATE		TIMELY EFFECTIVENESS	DEGREE OF TIMELINESS	DEGREE OF EFFECTIVENESS
		QTY. GOALS	QTY. PLANNED TIME	QTY. ACHEIVMENTS	QTY. REAL TIME			
						$\frac{\text{ACHIEVEMENTS}}{\text{GOALS}}$	$\frac{\text{REAL TIME}}{\text{PLANNED TIME}}$	$\frac{\text{ACHIEVEMENTS}}{\text{PLANNED TIME}} \times \frac{\text{PLANNED TIME}}{\text{GOALS}} \times \frac{\text{GOALS}}{\text{REAL TIME}}$

FACILITATORS

OBSTACLES





**SELF-EVALUATION TABLE**

INDICATORS

MONTH 09	DAY 27	YEAR 2004
-------------	-----------	--------------

FOUNDATION: XXXXX

ORGANIZATION: XXXXX PROJECT NAME: XXXXX

CATEGORY: Expanding Democracy UNIT OF ANALYSIS: The Organization

INDICATOR	BASELINE	GOAL		ACHIEVEMENT TO DATE		TIMELY EFFECTIVENESS	DEGREE OF TIMELINESS	DEGREE OF EFFECTIVENESS
		QTY. GOALS	QTY. PLANNED TIME	QTY. ACHEIVMENTS	QTY. REAL TIME			
Number of networks in which the organization participates	One	Three	6-06			ACHIEVEMENTS GOALS	REAL TIME PLANNED TIME	ACHIEVEMENTS PLANNED TIME GOALS REAL TIME

FACILITATORS

OBSTACLES



## GUIDE FOR FILLING OUT

## Format Four. Self-Evaluation Table - Indicators

- **OBJECTIVE:** Once the baseline is established in the indicator summary sheet, one utilizes the fourth instrument (Self-Evaluation Table – Indicators) to establish the initial (baseline) value; the desired (goal) value; and the obtained value (achievement to date). This allows one to record on one sheet the dynamic of the variables in relation to each one of the established categories for their respective goals as well as what has been obtained to date.
- **FOUNDATION:** State the name of the RedEAmérica foundation that funds and accompanies the project.
- **DATE:** State the month, day and year in which the format is filled out.
- **ORGANIZATION:** State the name of the organization responsible for the project.
- **PROJECT NAME:** State the name of the project that the organization is carrying out.
- **CATEGORY:** State which of the categories will be evaluated for its impact at the level of RedEAmérica: Collective Capacities, Social Capital, Expanding Democracy or Poverty Alleviation.
- **NAME OF INDICATOR:** State the indicator registered in the indicator summary sheet format two, which has been agreed upon and approved by the foundations that are members of RedEAmérica.
- **BASE LINE:** State the baseline or reference data that was obtained in the indicator summary sheet format two for each one of the established indicators.
- **GOAL:** Once the baseline has been determined the goal can be established. Goals are the desired situations or specified levels that must be attained by a specified date.
- **ACHIEVEMENT:** Once the project enters execution phase and the baselines and goals have been established, then the self-evaluation table allows one to register the advances and achievements of the goals as well as the dates of completion.
- **TIMELY EFFECTIVENESS, DEGREE OF TIMELINESS, DEGREE OF EFFECTIVENESS:** Timely effectiveness in a first instance is given by the proportional relationship between the proposed goals and the achievements obtained. The degree of timeliness understood as the proportional relationship between the planned time and the real time is a complimentary factor.

Both the concepts of timely effectiveness and degree of timeliness allow one to ascertain the degree of effectiveness understood as the degree of the accomplishment of the established goals according to the agreed upon quality and delivery requirements.

Timely effectiveness, degree of timeliness and the degree of efficiency allow one to gather the planned level of achievement, the amount of time planned for delivery, the real time needed for delivery, both degrees of achievement as they relate to amount and time. This can be understood as achievement with quality in a timely fashion.

When the self-evaluation table contains the baseline data, the goals and achievements to date, the evaluation group is required to convene the relevant agents of the organization, of the project and of the community in order to extrapolate from the existing data the facilitating factors and the factors that serve as obstacles.

The software that accompanies this manual facilitates calculating timely effectiveness, degree of timeliness and the degree of efficiency. To do this an organization is only required to provide the data within the application that is installed by the RedEAmérica foundation.

- **FACILITATORS:** State the factors that allowed the achievements to be accomplished.
- **OBSTACLES:** State the factors that impeded the achievement of the established goals.

## PLAN FOR IMPROVEMENT



### MOTIVATING QUESTION

**What strategies need to be implemented in order to adjust the course of the project and the organization in order to reach the established goals?**

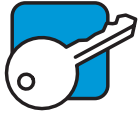
One of the advantages of the evaluation system proposed by RedEAmérica is the possibility of analyzing the information collected and organized in a way that allows the development of a strategy from a framework of continual improvement and the search for excellence. This strategy establishes an improvement plan that clarifies the necessary course correction.

The third workshop, which completes the information subsystem, is dedicated to planning the necessary adjustments through the development of an improvement plan. The guide for filling out the improvement plan specifies that, if applied for the first time, it should be fed by the summary sheet for descriptors / indicators where the principal weaknesses that need to be addressed will be prioritized for the areas of collective capacities, construction of social capital, expanding democracy and poverty alleviation.

If the improvement plan is to be reconsidered, using previously executed evaluations, the self-evaluation table will be the most appropriate instrument as a source of information for the analysis. Having identified the facilitators and obstacles the self-evaluation table will allow one to establish adjustments through strategic activities that can put the organization on a path toward the accomplishment of the established goals.

All of the above is collected in format five, Improvement Plan, which is presented below along with its corresponding guide for each one of the categories prioritized by RedEAmérica.





**IMPROVEMENT PLAN**

CONSTRUCTION OF COLLECTIVE CAPACITIES

FOUNDATION:

ORGANIZATION:

STRATEGIC ACTIONS	GOAL		RESPONSIBLE	ALLIANCES
	QUANTITY	FINALIZATION TIME		
VARIABLE 1 PRIORITIZED ACTIONS				
VARIABLE 1 PRIORITIZED ACTIONS				
VARIABLE 1 PRIORITIZED ACTIONS				
VARIABLE 1 PRIORITIZED ACTIONS				





**IMPROVEMENT PLAN**

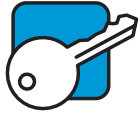
CONSTRUCTION OF SOCIAL CAPITAL

FOUNDATION:

ORGANIZATION:

STRATEGIC ACTIONS	GOAL		RESPONSIBLE	ALLIANCES
	QUANTITY	FINALIZATION TIME		
VARIABLE 2 PRIORITIZED ACTIONS				
VARIABLE 2 PRIORITIZED ACTIONS				
VARIABLE 2 PRIORITIZED ACTIONS				
VARIABLE 2 PRIORITIZED ACTIONS				





**IMPROVEMENT PLAN**

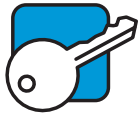
EXPANDING DEMOCRACY

FOUNDATION:

ORGANIZATION:

STRATEGIC ACTIONS	GOAL		RESPONSIBLE	ALLIANCES
	QUANTITY	FINALIZATION TIME		
VARIABLE 3 PRIORITIZED ACTIONS				
VARIABLE 3 PRIORITIZED ACTIONS				
VARIABLE 3 PRIORITIZED ACTIONS				
VARIABLE 1 PRIORITIZED ACTIONS				





**IMPROVEMENT PLAN**

**POVERTY ALLEVIATION**

FOUNDATION:

ORGANIZATION:

STRATEGIC ACTIONS	GOAL		RESPONSIBLE	ALLIANCES
	QUANTITY	FINALIZATION TIME		
VARIABLE 4 PRIORITIZED ACTIONS				
VARIABLE 4 PRIORITIZED ACTIONS				
VARIABLE 4 PRIORITIZED ACTIONS				
VARIABLE 4 PRIORITIZED ACTIONS				



GUIDE FOR FILLING OUT

**Format Five. Improvement Plan**

- **OBJECTIVE:** Establish a path that promotes the organization so that it may accomplish the established goals that have not been accomplished so far due to obstacles.
- **ORGANIZATION:** State the name of the organization responsible for the project.
- **FOUNDATION:** State the name of the RedEAmérica foundation that funds and accompanies the project.
- **STRATEGIC ACTIONS:** The first Improvement Plan that an organization formulates is derived from the "Summary Sheet for Descriptor / Indicator Formats One and Two," from which one can observe as variables the descriptors/indicators that obtained the lowest values. During this process the expanded board of directors diagnoses the weaknesses of the organization.

Beyond establishing the level at which the organization finds itself, the summary sheet collects the explanations which the evaluation group has developed about why it is at a given level. Next the evaluation group seeks to utilize the variables (groups of indicators) to establish the Improvement Plan that allows the organization to determine the necessary strategic actions. In turn those actions will permit the organization's progress in matters of collective capacities, social capital, expanding democracy and poverty alleviation.

Beyond the actions to be carried out it is necessary to determine the person(s) directly responsible for said actions and alliances which will improve the organization's performance in these descriptors/ indicators when the evaluation is executed again for a second time.

When dealing with a second and or a successive time in which the improvement plan is being designed, the plan's elaboration requires a different methodology. In these cases the source of information can be the Self-Evaluation Tables, which are used in such a way as to promote the effective use of the facilitators and to minimize or eliminate the impact of the obstacles. This allows the evaluation group to establish strategic actions that will lead to the fulfillment of the goals that have not yet been accomplished. Additionally, in each case the improvement plan will identify the person(s) responsible for said actions, the alliances that will catalyze their execution, as well as the indicators that need to be tracked for each instance.

The Improvement Plan consists of the prioritizing of the fundamental areas that need improvement during the next 12 months as analyzed by the "why" from Format One, as well as the facilitators and obstacles from Formats Three and Four in such a way as they may be applicable.

- **GOAL:** Determine the quantity and the time needed for the fulfillment of each proposed strategic action.
- **RESPONSIBLE:** State the name of the person within the organization that is directly responsible for the action that needs to be carried out.
- **ALLIANCES:** Determine the government, non-government and grassroots organizations that can support the proposed activity.

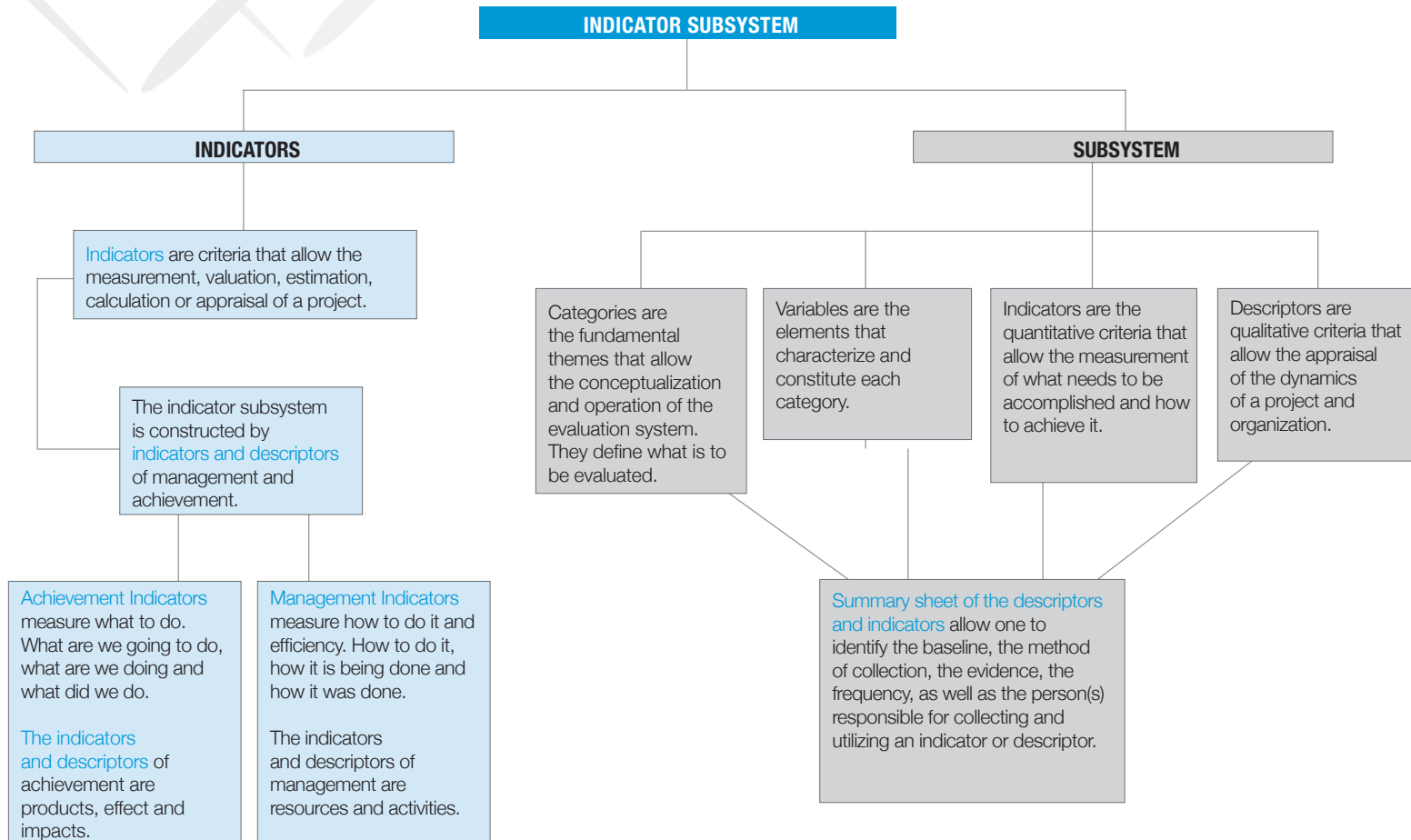


**EXERCISE 2.4**

**DESCRIBE THE INFORMATION SYSTEM THAT YOUR ORGANIZATION CURRENTLY UTILIZES, NO MATTER WHAT LEVEL IT IS AT.**

**ESTABLISH THE BASIC ELEMENTS OF THE INDICATOR AND INFORMATION SUBSYSTEM FOR YOUR ORGANIZATION.**





INDICATOR AND INFORMATION SUBSYSTEM

INFORMATION

**Information Subsystem** organize and measure the facts and opinions in a way that is meaningful for the project and the organization. With them the social management can take more effective and relevant decisions.

**Information Collection** is carried out in order to apply the indicators and descriptors, establishing in this way the value of the variables at different moments of the life cycle of the project.

**Information Organization** is carried out using the self-evaluation table, which registers the values that the application of the indicators and descriptors produces. The self-evaluation table arranges them in an orderly fashion and according to the logic of the evaluation group.

**Information Analysis** is carried out through the convening of the relevant actors to workshops, roundtable discussions or focus groups that allow the explanation of the dynamics of the indicators, variables and categories.

ADJUSTMENT

**Improvement Plan** allow one to carry out the necessary adjustments to minimize the obstacles and maximize the facilitators by considering activities that can yield better results.

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