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## ***If you don't count you don't count: Monitoring & Evaluation in South African NGOs***

### **ABSTRACT**

Non-Governmental Organisations (NGOs) are increasingly challenged to demonstrate accountability and relevance, with reporting, monitoring and evaluation arguably having become development activities in their own right. Drawing on interviews and observation research, this article examines the impact of intensified monitoring and evaluation (M&E) requirements on a number of South African NGOs. M&E – and the types of expertise, vocabularies and practices they give rise to – is an important area that is usually neglected in the study of NGOs but that significantly impacts on NGOs' logic of operation. By focusing on three areas – data that is considered appropriate to conduct M&E, staffing and organizational cultures and NGOs' reformist relationships with other civil society organizations (CSOs) – M&E is revealed as a central discursive element in the constitution of NGOs appropriate to neoliberal development. By engaging a neo-Foucauldian framework of governmentality, M&E practices are thus understood as technologies through which governing is accomplished in the trans-scalar Post-Apartheid development domain.

### **INTRODUCTION**

It is the weekly meeting of the health education team. There are fourteen staff members in the large conference room discussing sample sizes, base line data and mixed methodologies. Emma, the content manager, has prepared tables of indicators which are projected on the wall as the health channel manager is giving a run-down of the new monitoring and evaluation (M&E) guidelines required by one of the NGO's major international funders. Funding mechanisms have just changed, and alongside them, so have reporting requirements and impact assessment. People's eyes are glazing over as soon as S'bu begins speaking of heteroscedasticity.

Members of the designated research team that deals with monitoring and evaluation sit in on team meetings such as this one and occasionally speak up to clarify variables. They have backgrounds in psychology or economics, with high-level analytical and numerical skills. Judging by their facial expressions, most other staff members find this exercise both incomprehensible and irritating. Still, as the research manager puts it after the meeting, ‘sometimes people with money prefer numbers and graphs’.<sup>1</sup> Later in the kitchen the head of the schooling campaign complains that funders just do not understand that education is a process. He used to be a teacher.

This unremarkable scene took place in 2008 in the office of a large development NGO in Randburg, in the northern suburbs of Johannesburg, South Africa. The organization (*‘Horizon’*) is one of several NGOs examined in this article.<sup>2</sup> It creates and delivers resources for schools and the health community through Information and Communication technologies (ICT) and other more conventional media. The organization was undergoing significant changes in project design and implementation at the time of research, partly due to shifting donor demands for monitoring and evaluating the impact of their development activities. But this article also draws on in-depth interviews with staff from other, often smaller, NGOs that carried out activities in the fields of capacity-building and civil society strengthening. It explores how discourses and practices of M&E were employed by NGOs in relation to the impact data they produced, their organizational mode and how they positioned themselves in relation to the wider civil society sector.

Indeed, the article takes as its starting point the observation that NGOs in South Africa and elsewhere are increasingly challenged to demonstrate relevance and results due to the relative scarcity of development funds. Greater resources are allocated to M&E by NGOs but impact measurement is also becoming an ever-bigger priority for donors,

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<sup>1</sup> Interview with Director of Monitoring and Evaluation, Johannesburg, 1 February 2008.

<sup>2</sup> The data that has informed this article was mainly collected between February 2007 and March 2009. I interviewed over 40 NGO professionals and a range of other development practitioners. This was supplemented by observation research in NGOs and the analysis of documentary sources. A further round of semi-structured interviews was carried out in February and March 2011 with South African Corporate Social Investment (CSI) practitioners, exploring their employers’ partnerships with NGOs and issues of funding and monitoring. Names of organizations and NGO professionals were anonymized unless written permission was given for the use of quotations.

some of which now stipulate that a certain percentage of the budget be spent on M&E.<sup>3</sup> In the case of United States Agency of International Development (USAID) grants to South African NGOs for example, M&E is to make up 9% of total project expenditure. Other grant-makers may not specify a percentage to be spent on M&E, but have in place systems for reporting that demand considerable NGO resources, such as the provision of extensive narrative reports, budgets and financial audits. What is more, most of the NGOs in this study can be characterised by increasingly complex funding and partnership arrangements that encompass private sector donors, collaborations with the public sector and other CSOs, as well as more traditional foreign donor support.<sup>4</sup>

It is not only funding scarcity that has precipitated the growth in impact assessment. Transformations in public management over the past decade or more have put pressure on NGOs to prove good governance, accountability and cost-effectiveness. By the 1990s, what Power (1997) called the ‘audit explosion’ had also spread to the world of development. The need for the production of impact statistics has spawned a growing number of data collection instruments and indicators, and in some cases experimentation with different methods and measurement tools. M&E is also central to the aid reform agenda as stipulated in the Paris Declaration on Aid Effectiveness and its associated changes in aid modalities, in that M&E can provide accountability and contribute to results-oriented development.<sup>5</sup> The growing importance of M&E seems commonsensical – who could disagree with the need to demonstrate impact and being accountable to stakeholders. However, viewing the issue from within the logic of M&E neglects an analysis of power: what can be overlooked is not only how such measurements are done and who determines them, but also how their ubiquity enables particular roles for NGOs, shapes values and impacts on organizational cultures.

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<sup>3</sup> The title of this article reflects this trend, stemming from a press release of major funders operative in South Africa that read ‘Message to Africa: if you don’t count you don’t count’ (cited in Lehohla, 2007).

<sup>4</sup> The term ‘donor’ is thus used in this article to denote the whole gamut of grant-makers to NGOs. Where referring to the narrower meaning of foreign/ international donor agencies, this will be made explicit.

<sup>5</sup> The Paris Declaration of 2005 emphasises five principles to increase aid effectiveness: ownership, alignment, harmonization, results, and mutual accountability.

My point of departure here is not that development projects were not assessed in the past.<sup>6</sup> Rather, what is new is that reporting, monitoring and evaluation have become development activities in their own right. As such, they have become primary focus areas for international donors and increasingly also for Corporate Social Investment (CSI) programmes.<sup>7</sup> Moreover, there now exists an industry of M&E training in South Africa, offering workshops, short courses and even degrees in monitoring and evaluation, which further underlines its ubiquity in the development sector. This paper thus examines M&E as an important area that is usually neglected in the study of NGOs and that significantly impacts on NGOs' logic of operation and their positioning vis-à-vis other development actors. Impact measurement plays a key role in shaping NGOs' everyday activities and the discursive strategies they employ to think through these activities (Ebrahim, 2003). Apparently mundane techniques like M&E are understood as political technologies through which governing is accomplished in an effectively trans-scalar development domain. Theoretically, my approach draws on the now substantial literature that applies a neo-Foucauldian framework of governmentality to the study of development (see e.g. Ferguson, 1990; Ferguson & Gupta, 2005; Li, 2007).<sup>8</sup>

In line with this conception of power, I understand NGOs as amongst a multiplicity of development actors that apply diverse techniques and forms of knowledge to shape the conduct of others and themselves (Foucault, 1991). To govern in this sense involves the autonomy of the subjects of rule to choose freely how they conduct themselves, rendering central the practice of responsabilisation – of making individuals, communities or organizations responsible for their own change (Rose, 1999). M&E systems – and the types of expertise, vocabularies and practices they give rise to – are analysed as an example of techniques of calculation that are central to a neoliberal government rationality in the development domain and that shape behaviour by performance criteria. Far from being passively subjected to such practices of governing,

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<sup>6</sup> See Cracknell (2000) for a history of aid evaluation.

<sup>7</sup> CSI plays an increasingly important part in NGO funding in South Africa, accounting for R5.1 billion in 2009 (De Wet, 2010). Corporations in South Africa rely on NGOs to deliver programmes for them under their corporate social responsibility mandates, while successive funding crises have in turn forced NGOs to increasingly seek out corporate funding.

<sup>8</sup> Examples of applying governmentality theory specifically to the operation of NGOs include Bryant (2002), Sending and Neumann (2006) and Postero (2007).

NGOs can be understood as brokers or ‘bridge builders’ that employ and circulate meanings and practices of development. The last section of this paper, on NGOs’ relationships with less formalized CSOs, argues that NGOs’ capacity and expertise in relation to M&E can contribute to shaping the organizational forms available to civil society – a process of civil society alignment referred to as NGO reformism.

This study focuses on what I refer to as ‘intermediary’ South African NGOs. This terminology is intended to draw attention to the activities of the chosen NGOs in areas such as capacity building, research, lobbying, advocacy and training. It also emphasises that they provide a link between national and transnational actors, and organizations directly serving communities. All organizations in this study were blue-chip NGOs that were highly visible in the public sphere.<sup>9</sup> They had multiple roles and functions: as Government watchdogs, campaigners, capacity-builders to civil society, partners to the corporate sector that relies on professionalized NGOs to deliver CSI programmes for them, and also as deliverer of services on behalf of Government. Moreover, what united the selected organizations was the pressure of having to cope with increasingly complex procedures for reporting and impact measurement, partly resulting from the multiple cross-sectoral partnerships and funding models they increasingly employed.

At the outset, I wish to qualify my argument with two caveats. Firstly, carrying out multi-sited research into NGO practices requires an acknowledgement of the diversity of organizations considered. As I will show below, while M&E procedures were experienced negatively by many NGOs, they lent various forms of capital to others; certain technologies and vocabularies were adopted strategically and thus can be said to have ‘empowered’ yet others. The prevalence of a multiple partnership model in particular allowed some NGOs increased autonomy, especially in terms of the information they generated. Beyond recognising the heterogeneity of the South African NGO sector, this argument serves to highlight the indeterminate effects of particular development discourses and neoliberal techniques.

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<sup>9</sup> While this research does not claim to be representative of intermediary NGOs in South Africa, the organizations were selected because of their high status and visibility and because of their significance in the following areas: within the NGO sector as providing models and innovative approaches (e.g. in relation to partnerships and funding); in civil society as capacity-builders; and as influential on policy through research, lobbying and advocacy activities.

Secondly, the literature on M&E in NGOs provides examples of NGOs exercising significant control over a range of impact assessment methodologies (e.g. Giffen, 2009; Hailey et al., 2005; Holma & Kotinen, 2011). Somewhat contrary to these examples, M&E systems were determined by donors (whether international agencies or CSI funders) for the majority of the NGOs in this study. Some NGOs employed additional evaluation methods to assess the impact of their activities and to feed back to stakeholders, but donor-determined M&E shaped the development of future projects and the self-management of NGOs. In other words, there is a significant gap between the extensive debates and innovations surrounding evaluation, and actual M&E practices in the selected NGOs. Indeed, many practitioners portray log frames and participatory M&E as opposites (and as neatly corresponding with quantitative and qualitative data, respectively). I am not reviewing the relative advantages of each here (see Jacobs et al., 2010, for example) but rather seek to demonstrate the effects of monitoring regimes on NGOs' resources and mode of operation.

The article proceeds as follows: the following section emphasises the importance of studying M&E in NGOs and sets out a theoretical framework. Perceptions of M&E by NGO professionals are subsequently discussed. I then turn to a discussion of the impact of M&E in three areas: on the data that is considered appropriate to conduct M&E, on staffing and organizational cultures, and on NGOs' relationships with other civil society organizations.

## **STUDYING M&E IN NGOs: ACCOUNTABILITY AS A TECHNOLOGY OF POWER**

Although M&E is usually presented in tandem, it describes separate processes. Monitoring refers to the routine and continuous tracking of information about a project, often with a focus on outputs and collected for management and decision-making purposes. Evaluation consists of a periodic assessment of the outcomes, efficiency and impact of a project and is undertaken with a view to drawing lessons that may be more widely applicable. I take M&E to encompass both NGO-determined and externally-determined systems; that is to say, donor accountability *and* NGO learning (James,

2009). Ideally, these two are meant to significantly overlap but as will become apparent this was not the reality portrayed by NGO staff.

The principal evaluation criteria of M&E programmes, as set by the OECD (2002) and adopted by the majority of development agencies active in South Africa, are effectiveness, impact, relevance, sustainability and efficiency. CSI funders in South Africa tend to assess differently, focusing on the monitoring component of M&E and on tracking implementation – although this may be set to gradually change with CSI becoming more sophisticated. Besides providing NGOs with tools to measure programme effectiveness and efficiency, M&E is seen as beneficial in fostering public and political cooperation, supporting information needs for target audiences, promoting skills development and adaptive management and encouraging organizational learning (Bakewell et al. 2003). The latter, often associated with NGO-led monitoring, will be discussed in greater detail in the subsequent section.

Indeed, methodology is one of the areas in which NGOs' innovative potential is considered particularly important. Participatory Monitoring and Evaluation has seen attempts to include a range of stakeholders and develop new methods of impact measurement, seeking to locate knowledge production with the recipients of development (Conlin & Stirrat, 2008; Mebrahtu, 2004). Jacobs et al. (2010) distinguish between the following four types of participatory M&E methods: participatory rural appraisal (including social mapping); audio-visual tools (such as individual story-telling, participatory video etc); quantitative tools (such as community surveys); and anthropological techniques, such as participant observation.

It is accountability, however, that has been the most important reason for extending impact measurement. Hulme and Edwards define accountability as 'the means by which individuals and organizations report to a recognised authority (or authorities) and are held responsible for their actions' (cited in Roberts et al. 2005: 1850). A distinction is often made between upward and downward NGO accountability. Although upward accountability is required by donors, this is not necessarily the case with downward accountability to CBOs or directly to beneficiaries, drawing attention to issues of inequality in development partnerships.



Alongside greater investment of resources into M&E, there has been significant growth in the literature on evaluation. Debates in recent years have addressed experimental evaluation (White, 2010), quantitative participatory methodologies (Chambers, 2010), feedback systems (Jacobs et al., 2010) as well as the continued dominance of logical framework analysis. The potentially vast gap between the learning needs of an organization and donor-led M&E is noted in a range of contributions. One study of M&E practices of British NGOs in Ethiopia identifies a lack of shared meanings of M&E: the further away from the field individuals were located, the more likely they were to emphasize the potential of M&E to feed into organizational learning; conversely, field staff were found to emphasise accountability to donors (Mebrahtu 2004). Bryant (2007) finds that NGOs with the least donor funding were the ones doing the most about evaluation – possibly because in the case of donor funding, the evaluation is treated as part of contract compliance and donor needs must be met, as opposed to fulfilling the learning needs of the organization.

However, the afore-mentioned studies focus on INGOs operating in Africa as opposed to the South African organizations this research is concerned with. This distinction is significant as INGOs appear to be more likely to experiment with different methodologies. Indeed, the present research demonstrates that while M&E practices become ever-more sophisticated it would appear that only particularly ‘capacitated’ organizations are in a position to employ more innovative methodologies. This is not to imply that smaller or community-based organizations cannot use alternative methodologies in principle. On the contrary, it is often in the context of NGOs’ reporting back to community stakeholders that innovate ways of documenting and measuring impact emerged, such as participatory video methodologies. A range of participatory M&E methods were also employed in their own debriefing and learning processes by some of the NGOs in this study. Crucially however, these were unlikely to be accepted by funding partners, especially where an organization had relatively little bargaining power. The existing literature on M&E in NGOs moreover does not take into account that NGOs need to increasingly demonstrate accountability to a diverse range of donors, including corporations and INGOs, and in a variety of formats.

One way of theoretically grappling with the issue of accountability is through an understanding of its associated practices as technologies of power. As for instance Strathern (2000) has shown, accountability has come to carry a whole range of practices, procedures and values. From this perspective, ever-more sophisticated auditing, monitoring and evaluation form part of a paradigm of knowledge which, concerned with quality control, good practice and economic efficiency, is specific to neoliberal forms of government. In the development domain, accountability is often understood in narrow financial terms and represented as a technical issue while assuming that the implementation of specific audit procedures will produce legitimacy.

‘Rituals of verification’ (Power, 1997), such as M&E, are global phenomena that affect diverse domains and institutions, and have been connected to the rise and global spread of New Public Management (NPM). This reform agenda assumed that public services would be more effective if organized according to the principles of market economics and that the management of such marketized public services would be more efficient the more it resembled private sector management practices (Shore and Wright, 2000). A new financial rationality was applied to organizations and their practices, with accounting providing a technology for ‘acting at a distance upon the actions of others’ (Rose, 1999: 152). The re-organization of public institutions and formerly extra-economic domains according to such a financial rationality is enabled, as Miller (1994) has argued, by constructing calculable spaces that can be made governable through experts and expertise.

Accordingly, accountability is one of the key concerns of neoliberal development, linking the discourse and practices of good governance on a global level with those of corporatist governance of NGOs; both are concerned with efficiency, good practice and inclusion. Intersectoral development partnerships – as one preferred mode of delivering development – encompass multiple levels of accountability that operate as channels for the circulation of particular managerial and auditing practices, connecting CBOs, NGOs, public and private sectors, donors and INGOs.<sup>10</sup> M&E practices are thus understood here as technologies of governing that enable the shaping of the behaviour of NGOs and their linking up with other national and global actors.

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<sup>10</sup> See Abrahmsen (2004) on the power of partnerships.

As already noted above, the concept of governmentality has been engaged to analyse how development relations provide a context for disciplinary practices, aimed at regulating social life by producing citizens. Therefore capacity building initiatives, as regularly sponsored by donors and implemented by NGOs in South Africa, can be understood as political interventions designed to produce modern economic. In the present context this theoretical approach is extended to explore the governing practices through which NGOs are to be made responsible, efficient and entrepreneurial. For the purposes of this paper, I am not concerned with the constitution of individuals as citizens or entrepreneurs (although this is clearly an absolutely central effect of NGOs' work in development) but rather in M&E as one of the central discursive elements in the constitution of organizations appropriate to neoliberal development.

### **NECESSARY EVIL OR LEARNING OPPORTUNITY: NGO PERCEPTIONS OF M&E**

This section focuses on organizational sustainability, organizational learning and power relationships with donors as the key themes affecting NGO professionals' perceptions of M&E. The vast majority of interviewees experienced it as a 'necessary evil', 'burdensome', 'fixed' and 'rigid'. CSI approaches to M&E in particular were portrayed as lacking sophistication and predominantly tracking compliance. This is concurrent with the relative absence of debates on monitoring CSI in the literature.

Sitting in on NGO meetings such as the one described earlier, I was often struck by the disdain with which staff greeted discussions about targets, indicators and impact measurement. 'If we can't give the numbers we don't get the money' was a complaint often voiced; the language of M&E was used ironically: 'what do you call it, mixed methodology'. The perception of M&E as a 'tick-box exercise' and as a mechanism for uniformity conveyed a self-portrayal of NGOs as weak, with no agency and little power in hierarchical reporting structures. This construction can be contrasted with data gained from observation research: NGOs were constrained by donors, especially international agency funders, in certain ways. But they were also actively involved in the circulation of development concepts and techniques, especially in relation to their community-based

partners, as I will further discuss below. Also, NGO staff were dealing with the impact of M&E requirements in different ways and many creatively negotiated the constraints of their funder-partners' demands.

NGOs that are already better equipped to deal with stringent donor requirements are certainly in a better position to exploit the potential for organizational learning on their own terms. Within *Horizon*, there was constantly an effort to 'piggy-back' off research for funders. For instance, the organization measured socio-economic indicators that were not required by their foreign donors in order to seek further funding from other sources at a later stage. Piggy-backing thus constituted an attempt to bridge the gap between donors' needs and whatever the NGO might be able to gain from collecting that information. Sitting in on meetings where M&E systems were planned, it often seemed as though measuring was done for measuring sake – even if it was unclear how particular data would contribute to project evaluation. Overall, there is evidence of a broader conceptualization of evaluation methods at *Horizon* and other already-capacitated organizations than at smaller organizations in this research.

Whilst reporting was identified by all interviewees as increasing staff workload, it was nonetheless welcomed as positive by many. For example, Tom pragmatically saw M&E as an absolute necessity, arguing that without it his NGO would not exist. The increased donor emphasis on M&E was further positively associated with financial accountability, sound budgeting, project management skills and organizational learning, taking NGOs through a 'budgeting exercise' that 'encourages rigour'.<sup>11</sup> Successful compliance with strict reporting requirements presented a virtuous spiral for some as it could demonstrate financial accountability. The director of a Durban-based human rights NGO noted that 'having a German funder, the audit and the accounting is very strict. So especially the EU funders say we could go with [this NGO] because they know the money is safe'.<sup>12</sup> Conversely, an organization without a track record will find it more difficult to access any funds at all, whether from more traditional donors or through CSI. Corporate sector organisations in particular want to work with NGOs that are well-

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<sup>11</sup> Interview with M. Oyedan, Director, Agenda, Durban, 27 June 2007

<sup>12</sup> Interview with NGO director, Durban, 25 June 2007

established and that have the ability to monitor and document their work in a way suitable to corporate standards and requirements.

The link between monitoring and sustainability is an important one. It accounts for why some NGOs understand externally-determined monitoring practices as productive despite the added strain on organizational capacity. In addition to establishing a track record, continuous assessment of one's impact can ensure that an NGO remains competitive: '[monitoring] is a key part because we need to constantly better ourselves. Because we may be unique today, but tomorrow we're not unique'.<sup>13</sup> The sentiment about improving oneself that is expressed by this director of an education NGO points to organizational learning as a key aspect of both donor-led and NGO-determined M&E. But the phrase 'to better oneself' also echoes neoliberal thinking on individual and organizational obligations of self-government and responsabilisation. From this perspective, organizational learning can be seen as a government rationality that is concerned with NGOs' capacities to reform themselves.

Framing learning in this way raises a number of issues. In this case, the organization learnt financial accountability through continuous monitoring. Auditing techniques or project management strategies were sometimes highlighted as outcomes of organizational learning processes that evolved through collaboration with donors. While these are undeniably important organizational skills, they only address the managerial aspect of an NGO's work. Organizational learning is constructed in technical, administrative and financial terms. Indeed, accountability itself is understood as a technical or managerial issue, a tool with which certain outputs can be achieved. It has been noted that the automatic preference of an audit form of accountability often goes at the expense of evaluation as learning (James, 2009). Audit systems might then impede genuine learning, since their main function is to highlight the short-term success of a project (Ebrahim, 2003). This again speaks to the tension between externally-led and NGO-determined M&E.

There are significant differences between individual funders' requirements and approaches to reporting. Bi- and multilateral donors such as the EU or USAID were described as having the most 'unreasonable expectations', as some put it, demanding

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<sup>13</sup> Interview with NGO director, Johannesburg, 10 March 2008

extended paperwork and exact adherence to formalistic demands. Some NGO directors had taken conscious decisions not to engage with this set of funders at all. CSI reporting was perceived as most clearly divorced from the learning needs of NGOs; here, monitoring was portrayed as simplistic, for example consisting of producing 'photographs with Mandela outside the school they just paid for somewhere in the Eastern Cape'.<sup>14</sup> Other donors, for instance the Ford or Mott Foundations and some of the grant-making Northern NGOs, were characterised as more adaptable and culturally-sensitive, often including knowledge-sharing workshops, local personnel and greater methodological flexibility.

Perceptions of the unilateralism of reporting, vis-à-vis a more genuine transformative learning process persisted amongst practitioners, however. Concerns were frequently voiced about the paternalism of foreign donor-led M&E, which seemed to imply that 'Africa is unable to evaluate'.<sup>15</sup> The fact that development indicators are set by donor agencies which are situated outside of the country does indeed raise questions about what comes to constitute development knowledge and how it is measured. More generally, this point is a reminder of the fact that M&E is necessarily shaped by relations of power. Decisions about what and how to monitor reflect the power relations that also underpin other development activities and relationships.

Personal relationships operated as disturbing factors, which mediated the regimes that govern evaluating and reporting. Personal relationships and networks are of course a factor in mediating NGO-donor relationships elsewhere, too. However, in Post-Apartheid South Africa they are profoundly significant both due to a shared history of the liberation struggle and the effects of the fairly common career progression of activists from NGO employment into public sector. The overall perception of M&E as homogenizing therefore does not imply that there is a single determinate outcome of this mode of NGO governance; the relative autonomy of NGOs can be both increased and restricted by intensified reporting demands.

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<sup>14</sup> Interview with Director of Governance Programme, Cape Town, 23 April 2007

<sup>15</sup> Interview with Director of M&E, Johannesburg, 1 February 2008

## **WORKING WITH PROCESS: ISSUES OF MEASURABILITY**

Some of the inherent challenges and limitations of monitoring and evaluating development work are well-documented in the literature and include the non-linearity of political change, the complexity of contextual variables and issues around methodology, attribution, resources and timings (Bakewell & Garbutt, 2005; Jacobs et al., 2010). In this section, I have limited myself to discussing two points only in relation to the measurability of development impact that were frequently raised by NGO professionals: first, log frames and their continued perception as limiting, for example in relation to the exclusion of qualitative data; and second, the perception of reporting requirements favouring product output. Ebrahim's (2003) distinction between product data and process data is useful for this discussion. Product data is generated about physical and financial details, focusing on easily measurable indicators and quantitative analysis; process data about qualitative dimensions of NGOs' work is context-specific and interpretative in nature.

The most common type of product data analysis for the NGOs in this study was logical framework analysis (LFA). The log frame matrix was first introduced by USAID and became the standard approach for planning, approving and monitoring development work as part of the shift to results-based management. 'Managing for results' also constitutes a key principle of the Paris Declaration on Aid Effectiveness and its associated aid modalities (Holvoet & Rombouts, 2008). The 4x4 matrix accommodates goals, outcomes, outputs and activities of a given project for which information can be given in a narrative description, objectively verifiable indicators of success, means of verification and assumptions and risks.

Log frames were usually described negatively by staff as limiting and prescriptive. Similarly, the M&E literature increasingly discusses methodologies such as LFA as simplistic approaches and portrays as widespread the use of more innovative alternatives. The fact that recent debates in impact evaluation have focused on the limitations of quantitative methodologies seems to imply that the former are no longer commonplace in NGO practice (Conlin & Stirrat, 2008). Yet, despite extensive criticisms, LFA and similar results-based methodologies continue to be the most-widely used monitoring tool for foreign donors, INGOs and for some of the biggest corporate

sector funders in South Africa. According to donors (many of whom take on board NGO critiques around measurability), a log frame is not intended to include every detail of the project but rather to function as a logical summary of its key factors.

NGO professionals reported to be excluding qualitative types of data because they saw much of what they understand to be at the core of their work, such as participatory work with communities or education workshops, as not fitting into a log frame matrix. Participatory monitoring can address some of these perceived limitations; indeed, participatory processes can be employed to identify indicators and objectives, in order to then develop the log frames (Jacobs et al., 2010). This was not reflected in NGO practice however, not least because limited resources and capacity often make for an either/or scenario in terms of monitoring. As noted earlier, the majority of NGO staff were aware of a whole range of alternative methodologies (indeed often using them in their internal evaluations), but were not able to employ them in their reports to donors. Moreover, having to sum up key factors in the log frame format was seen to lend a specific focus to a project, even when the NGO had no intention to reduce the project to these key factors. Having to fit proposals into fixed grids appeared not only to prescribe how results were reported but also to predetermine them, with little space to evaluate secondary or unexpected outcomes.

Turning next to the issue of product output, current reporting requirements lend themselves to manufacturing discrete NGO products as opposed to more complex development processes. Most obviously, donor-led project evaluation tends to over-emphasise quantitatively measurable outcomes and measuring predefined products (such as numbers of computers or schools). This emphasis was particularly noticeable with corporate donors and CSI projects. Taking the example of the NGO described in the introduction, monitoring for its funders assessed how many people had been in contact with the NGO's health education outputs.<sup>16</sup> Discussions about the various channels and projects were framed in terms of targets and sites and the number of individuals passing through community centres. Consequently, NGO expertise was required in technical

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<sup>16</sup> Some funders of health education monitor the number of individuals that are accessed through community outreach, which requires the use of facilitators. In this way, the obvious gap between the number of individuals simply being present and those actively engaging with educational content is to be overcome.



domains (such as content production and delivery, or IT) and in the NGO's research department, with the organizational focus on fixing areas identified as monitoring priority by the funders.

Where an organizational focus on product information already existed, as in the case of 'new-generation' NGOs, there are greater consistencies between funders and NGO, and less of a need for the NGO to redefine its understanding of success based on funding requirements.<sup>17</sup> As is frequently noted in the literature reviewed above, the short-termism of development grants further exacerbates the problem of the exclusion of data, since developmental change – if it can be measured at all – does not happen within one- or two year budgetary cycles. The demands of multisectoral partnerships, as increasingly commonplace development delivery modes for intermediary NGOs, intensify this timing challenge since corporate sector donors have particularly short time frames and usually want to see the rapid implementation and success of highly visible projects.

But the emphasis on product output also applies to marketable products such as media platforms, publications and so on. Indeed, commercialisation can form part of an NGO's sustainability strategy, involving the development of profitable activities by charging for consulting, training or in recent years increasingly grant-managing. Commercialisation is moreover encouraged by donors in other areas, such as NGOs charging for capacity building workshops. Impact assessment of capacity-building is arguably more complex, as it encompasses intrinsically intangible processes (Hailey et al., 2005).

The principle of commodification constitutes an important part of the ongoing transformation of development into a competitive market, and of NGOs into enterprising, competitive organizations. This shift impacts on how NGOs conceptualise the development projects they develop and implement. Whether a 'development solution' is marketable as a product becomes an important criterion in the conception of projects. For

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<sup>17</sup> I use the term 'new-generation NGO' as a shorthand to describe organizations that emerged in recent years as well as older ones that were able to survive the sector's funding crises and successfully navigated shifting Post-Apartheid development modalities. The concept emerged from the observation that many NGO staff described funding modalities, sustainability approaches and organizational practices in opposition to a more traditional NGO model – one defined with reference to service organizations during Apartheid and their role in the liberation struggle.

example, *Horizon* explicitly framed its development project as the '*Horizons* solution'. This language points to practices of problematization and 'rendering technical' that are central to a neoliberal rationality: the constitution of an object of thought and identification of a problem as linked to the availability of a solution (Foucault, 1989). Problematization moreover serves to confirm expertise and sets up boundaries between expertise- and capacity- haves and have-nots. As the examples in this section demonstrate, M&E practices both constitute and produce specific forms of expertise and knowledge. It is these forms of expertise that I will turn to in the next section.

To reiterate from the above, the contention in the M&E literature that rigid measurement formats are being phased out does not hold up in the South African development domain where they continue to be used by many major donors as well as by corporate grant-makers, the latter particularly emphasizing quantitatively measurable outputs. Indeed, while harmonization as a key aim of the Paris Declaration and Accra Agenda for Action is intended to reduce the transaction costs arising from dealing with a variety of donors, formats and procedures, it may well lead to a resurgence of technocratic approaches to M&E. Moreover, the increasing importance of CSI funding for intermediary NGOs has implications for how NGOs conceptualize the impact and effectiveness of their interventions.

## **TYPES OF EXPERTISE AND ORGANIZATIONAL FORMS**

M&E requirements affect NGOs not only by favouring particular ways of measuring the impact of a project, but also by influencing organizational culture, as this section will argue. Specific capacities, resources and skills are needed for an NGO to be able to fulfil donors' data requirements, and to qualify for further funding. It is important to stress that participatory M&E, whether donor-led or NGO-determined, also necessitates specific types of expertise for which capacities must be created; participatory methodologies are also governmental. The data presented here can thus be contrasted with much of the literature on participatory M&E that assumes, as Jacobs et al. put it, 'an idealised commitment to participatory practice, and that managers have the time and resources to invest in it' (2010: 40).

Measurable outputs are recent donor requirements and require capacities that did not fall within the core expertise of many NGOs in this study. PEPFAR's (2007) manual for implementation partners in Southern Africa is instructive in this regard as it outlines the features of a successful M&E unit, indicating the types of NGO expertise required: epidemiological expertise, social science expertise, data processing and statistical expertise, and data dissemination expertise. The infrastructural and informational resources that are required for this kind of M&E include data dissemination systems, centralised databases and second generation-surveillance. Most NGOs lacked the resources to attract this type of capacity, especially given the South African context of brain drain.

For larger organizations in this study, increased reporting requirements necessitated the hiring of new staff to cope with the added workload. Personnel with high-level quantitative-analytical skills were increasingly sought after by NGOs. This can result in a shifting of the balance between project staff and support staff, the latter including administrators and accountants, but in some cases also psychologists and statisticians. What is more, by needing to employ people with quantitative-analytical skills, NGOs increasingly compete for staff with corporations and effectively have to pay higher salaries. Aside from an added strain on financial resources, this can adversely affect organizational culture as certain skills come to be seen as of higher value, as Ebrahim (2003) and Roberts et al. (2005) have demonstrated.

In the smaller NGOs in this study, it was usually the director that took care of fundraising and reporting. Where possible, auditing was outsourced because those skills were not available inside the NGO. Generally speaking smaller NGOs, not being able to spend the same resources and budget on M&E, were most negatively affected by monitoring regimes, as this director of a research and policy NGO with considerable M&E expertise acknowledged: '[monitoring] becomes so complicated that it has excluded large numbers of CBOs from actually being able to understand and fulfil the requirements. Completing log frames, and all sorts of things. Even we sometimes have difficulties meeting those very stringent requirements'.<sup>18</sup>

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<sup>18</sup> Interview with A. Motala, Executive Director, CSV, Johannesburg, 2 May 2007

Given that the vast majority of intermediary NGOs in this research relied on local CBO partners, the issue raised in the above extract is vital. CBOs are usually contractually obliged by NGOs to provide financial reports, narrative reports and annual financial statements, which the NGOs then report upwards to their grant-makers. In this regard, the relationship of accountability and its associated requirements mirrors that of NGOs to their donors. As I will discuss below, NGOs can come to play the role of an educator or translator in their relationships with community-based organizations, employing M&E techniques as part of their own reformist practices within civil society.

But expertise is also required and produced in relation to the language of (funded) development, as the leader of a mid-size research NGO in Durban stressed: ‘This is the terminology [...] from the OECD, so we must use it. If you do not fit in it word for word, it is immediately rejected’.<sup>19</sup> As with any other language, failure to speak it properly means being excluded from the conversation; that is to say being excluded from funding flows. Conversely, entering into funding arrangements requires a high level of buzzword fluency. NGO staff reported that they were increasingly required by grant-makers to attend courses on how to complete grant applications or monitoring documents. Importantly for the argument put forward here, such training for purposes of tendering or reporting was framed in terms of capacity building while it is highly specific managerial skills that are transferred. Skills-oriented learning and human resource development were regularly conflated with developing staff capacities according to project-related or organizational needs. Forms of shallow capacity building are central to what Ong (2006) refers to as optimizing technologies at the heart of neoliberalism.

Besides having to be well-versed in current development terminology, perfect command of English in a professional and bureaucratic context is necessary. This ability is helped by being a native English speaker, which in South Africa often means being middle-class and urban; conversely, less professionalized or rural civil society organizations are disadvantaged. Class position impacts on the ability to speak the language of efficiency and may exclude certain organizations entirely from funding flows. At a more general level, class position marginalises certain issues from the field of activity of professionalized NGOs. For instance, first-generation human rights issues

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<sup>19</sup> Interview with NGO director, Durban, 28 June 2007

connected to political liberty seemed to exercise many NGOs more than socio-economic rights.<sup>20</sup> It is NGOs' relationships with organizations who precisely struggle for socio-economic justice that will be addressed in the next section.

## **LEARNING HOW THINGS OPERATE: NGOS' RELATIONSHIPS WITH OTHER CSOs**

I now turn to the effects of intensified monitoring and evaluation regimes on NGOs' relationships to other CSOs. The key issue in this section is how NGOs, through the employment of M&E techniques, might 'conduct the conduct' of community-based organizations and social movements that they work with.

Writers such as Habib (2003) emphasise the plurality of South African civil society, suggesting that Post-Apartheid civil society is made up of three blocs: formalized NGOs, 'survivalist' community organizations and social movements. The selected NGOs are part of the former category: as outlined above, all had international linkages and diverse sources of income from donors, the private sector and Government contracts; all worked, to some extent, with community-based organisations. The NGOs would describe themselves as progressive, playing advocacy and lobbying roles in relation to issues of socio-economic justice and human rights. A number of them directly supported social movements that challenge Government policy on service delivery, either by providing financial or legal resources or through campaigning and publicity work.

I will highlight three interconnected aspects about M&E that I see as central to the relationships of the NGOs in this study with other types of CSOs. At the most basic level, NGOs that had entered into funding regimes found it increasingly difficult to work with less formalised organizations that are not structurally equipped to prove results-based management or adhere to complex reporting systems. As the director of an organization

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<sup>20</sup> For example, this is evident in the observation that it was seemingly only with the Government's assault on the mainstream media – in 2005, the ANC obtained a gagging order against the *Mail & Guardian* over 'Oilgate' and also threatened *Business Day* and the *Sunday Times* with legal action over articles following up on the story – that many formal NGOs began to become aware of the realities of repression and of freedom of expression issues faced by social movements in South Africa (Interview with Jane Duncan, then-Director of FXI, Johannesburg, 30 March 2007).

that provides education and research for labour and social movements put it, ‘we only work with the ones who do have a photocopying machine, who can account for all the money’.<sup>21</sup>

Second, NGOs sometimes end up playing a translation role vis-à-vis less professionalized CSOs. For instance, participatory processes may be used to design and monitor programmes by their local partner, but NGO staff repackage the stakeholder process in a log frame format for their donors. This process of translation produces a hierarchy that establishes the NGO as expert, with the power to represent a CBO’s activities and development objectives.

This leads to the third point that capacity building in civil society was considered by most NGOs in this study as one of their primary roles: ‘we recognise that some of the CBOs do not have the resources or capacity to do everything we expect them to do, so we bring in the resources including financial resources, but we also help to build capacity’.<sup>22</sup> The role of this and similar intermediary NGOs consists of organizationally developing the capacity of local organizations that then do the ‘actual work’.<sup>23</sup> The reclassification of South Africa as middle-income economy and subsequent funding crisis has moreover led many blue-chip NGOs to follow the market and work outside of South Africa. Project development for Southern Africa is required by some foreign donors, and NGOs both rely on local partners and carry out capacity building programmes:

We have got a product, which we have used in Zambia, Zimbabwe, Angola and the DRC, where we go in for a year and train NGOs and build capacity and one week its advocacy, next it’s admin, the next week it’s dealing with the press, the next week it’s whatever.<sup>24</sup>

Here, the concept of what NGOs should be and how they should operate – doing advocacy, being professional, organized and media-savvy – is exported into the Southern African region. Organizations are to attain administrative and financial skills and are

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<sup>21</sup> Interview with L. Gentle, Director, ILRIG, Cape Town, 24 April 2007

<sup>22</sup> Interview with NGO director, Johannesburg, 14 March 2007

<sup>23</sup> Interview with Senior Researcher, Durban, 25 June 2007

<sup>24</sup> Interview with Director of Governance Programme, Cape Town, 23 April 2007

trained in media work, research and monitoring capacity. Particular vocabularies, techniques and types of expertise are circulated through capacity building programmes and NGO networks; capacity building and organizational learning (re)produce organizations with similar characteristics. An analysis of capacity-building thus raises important questions about the pedagogical role of NGOs.

The civil society dynamics documented above are sometimes captured under the heading of the ‘NGO-isation’ of civil society – the potential for formalisation and professionalization inherent in CSOs’ accessing of funds (often, but not always, from formal NGOs).<sup>25</sup> But civil society relations are also characterised by a pedagogical drive of NGOs wanting to shape civil society organizations ‘in their image’ – a process I refer to as reformism. Reformism is linked to, but distinct from processes of NGO-isation in that I conceive of the former as concerned with behaviours and mindsets. Importantly, NGOs’ reformism does not necessarily lead to NGO-isation. As I have argued more fully elsewhere (Mueller-Hirth, 2009), NGOs act as experts which transfer how effective development work is to be done. The concept of reformism is suggested because the notion of an ideological co-option of the struggle by NGOs, as it is often put forward by activists, arguably does not fully capture the complex practices of civil society alignment in terms of M&E technologies, information systems, vocabulary and so on.

The key point here is that M&E practices are entangled with processes of reformism. M&E is internalised and becomes a prime indicator of improved capacity that coexists alongside the rhetoric of partnership. Institutionalised expertise can serve as a channel for governing practices and the responsabilisation of civil society. The need for audit expertise influences NGOs’ positioning towards their civil society counterparts and therefore has the potential to establish hierarchies and contribute to the institutionalization of community struggles.

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<sup>25</sup> The NGO-isation of social movements has been well-documented in a variety of settings, such as Palestine (Smith 2007), Latin America (Alvarez 1999) and Russia (Richter, 2006). Although overwhelmingly perceived as negative by activists from social movements and CBOs interviewed for this study, NGO mediation clearly offers opportunities to bring issues that affect poor communities to the attention of policy-makers. Moreover, despite many examples of NGOs ‘speaking for’ social movements and CBOs (also see Zikode, 2008), some of the prominent social movements in South Africa have strategically worked with progressive NGOs who have channelled funds to them and have built capacity.

## CONCLUSIONS

In this paper I have emphasised the need for studying auditing techniques in NGOs as a central aspect of their work that impacts on the way they think about their activities, on their logic of operation and their location in wider civil society. I have explored some of the types of expertise that auditing requires and produces. These include, as a minimum, language skills (including fluency in ‘developmentese’), financial expertise, data processing and dissemination skills and quantitative-analytical capacities. Increasingly, NGOs are expected to be efficient financial managers in addition to, or perhaps as opposed to, being efficient at what it is that they do as their ‘core business’. Calculative practices such as M&E require specific skills and capacities which produce an ideal-typical model of Post-Apartheid NGO that is streamlined, flexible and responsible and able to research, count and audit correctly. The time and resources spent on donor-led monitoring diverts from NGOs’ core activities but also from evaluating their work in self-determined (and potentially more innovative) ways.

At the same time, it is important to stress that, although NGOs in this study were constrained by auditing technologies, the outcomes of these practices are far less uniform and secure. NGO staff often discussed M&E rather stereotypically, in terms of donors demanding quantitative data and the NGO wanting to express complex issues. Indeed, results-based methodologies such as log frames do not lend themselves to expressing complex project realities, tending to obscure project aims perceived as political, contentious or simply ambivalent; structural relations are excluded from evaluation and from future project design. Despite the prevalence of discourse and practices of partnership, there remains a fundamental tension between externally-determined and NGO-led M&E.

However, a more nuanced picture also emerged in this research. Firstly, M&E formats varied from funder to funder, and between different types of donor. Secondly, the more capacity an NGO has the more it is able to use M&E as a resource. This is well encapsulated in the concept of ‘piggy-backing’ that was significant in a number of the NGOs discussed above. Reporting and monitoring regimes work much more as disciplining mechanisms where there is no capacity. So-called new-generation NGOs are set up to deal with such challenges more effectively. Nonetheless, monitoring and



evaluation necessitates the acquisition of specific types of expertise. The adoption of multisectoral funding models puts further strain on NGO resources and demands organizational and methodological flexibility.

It is hard to disagree with demands for greater accountability of NGOs and with the adaptation of systems that can demonstrate transparency and reduce transaction costs of development projects. Nonetheless, it is far from clear what this accountability means given the impact of auditing practices on NGOs as they were presented here, and whether more (or more sophisticated) auditing or reporting systems result in better development work. Demands for accountability and transparency are ultimately connected to claims of empowerment and the democratisation of development. Quite contrary to such claims, monitoring was shown to potentially exacerbate hierarchies within civil society and to exclude certain organizations altogether. Fluency in the language and practices of M&E displays accountability and transfers legitimacy. NGOs' role as a translator of monitoring techniques to their community-based partners is central to this hierarchy of legitimacy.

As I have sought to show in this paper, the implementation of extensive monitoring systems necessitates organizational restructuring and the acquisition of specific types of (mainly quantitative-analytical) expertise. M&E practices moreover require certain organizational conditions which favour and indeed produce highly organized and professionalized types of NGOs, whilst marginalising others. Intermediary NGOs such as the ones considered in this research are broadly favoured by the current reporting regimes: research NGOs for instance already have the research and reporting expertise that help with M&E requirements.

Given that auditing changes the very organizational structures of those required to audit, there is a danger of even progressive organizations becoming integrated in terms of their modus operandi into the neoliberal order they set out to change. The vast amounts of time and resources that are required by auditing put such strain on organizational capacity that they actually slow down or indeed prohibit genuine NGO activity. What impact measurement then ultimately produces is NGOs that are effective in terms of management, governance and audit, but not effective at their core mission. This is particularly regrettable in the case study context of South Africa given the vast

developmental challenges and inequalities facing South Africa and the deeply felt betrayal of freedom's promises by the majority population.

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