

Swedish Organisations' of Disabled Persons International Aid Association (SHIA) Activities and Cooperation Relationship

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Sida Evaluation 06/58

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1. Summary

1.1 Introduction

Background and purpose

Sida's unit for cooperation with Swedish non-governmental organisations, SEKA/NGO, commissioned Jarskog Konsult for this evaluation. Anders Ingelstam (Acumenta), Håkan Jarskog, (Jarskog Konsult) and Cecilia Karlstedt (Cecilia Karlstedt Consulting), carried out the evaluation. Lennart Peck (Boman & Peck Konsult) was responsible for quality.

Sida's terms of reference, dated 22-02-2006, governed the evaluation, whose main purpose was

- To assess the relevance in SHIA's programmes for development cooperation.

In this evaluation, a "relevant" programme means that SHIA, its member associations and local partners are working towards SEKA/NGO's objectives. The evaluation was based on this objective, which has governed our work.

At the introductory meetings with Sida and SHIA a number of points were clarified for the purposes of the evaluation and some changes were made to the terms of reference. These changes were documented in the introductory report, which was approved by Sida and SHIA.

SHIA

SHIA, the Swedish Organisations of Disabled Persons International Aid Association, is a non-profit organisation whose purpose is to support its member organisations engaged in development cooperation in developing countries.

SHIA has 26 member associations. Just over half of them are active, and some of these are very active, while just under half have limited or negligible involvement in international activities. Three associations account for approximately two-thirds of the SHIA project portfolio.

SHIA's work is based on the premise that when people with disabilities join forces, they gain in strength. Together, they can demand their human rights, and thereby be seen as people in the fullest sense of the word.

SHIA's member associations support around 60 projects in over 20 countries.

1.2 Method

We carried out the evaluation in five clearly defined steps:

1. Define concepts and decide on formulation, documented in an introductory report.
2. Decide on evaluation criteria.
3. Select projects to study.
4. Collect data.
5. Analyse the information and draw conclusions.

1.3 The Swedish Associations' Roles and their Contributions to Activities

The main reason for the Swedish member associations to participate in cooperation projects is to plan activities together with their local cooperating organisations in order to share expertise, methods and experiences about how to form, run and develop a disability organisation and its activities. Our view is that the majority of the associations do not do this in a structured way.

In our opinion, many associations have not thought sufficiently about their contribution in the cooperation and how to go about it. However, a small number of associations have worked very actively with this question, so the associations vary a great deal.

1.4 Cooperation Relationships between Swedish Associations and Local Cooperating Organisations

Our assessment is that the relationships are weak in more than half of the 15 cooperation projects studied, which we consider unsatisfactory.

Naturally it is difficult to identify the underlying cause of the weak cooperation relationships, but we an explanation may be found in a fundamental attitude in the Swedish associations. The cooperation with the local cooperating organisation is based on the project, not the relationship. This is particularly evident when an association is looking for a party to implement “its” project. In these cases, there is a total lack of understanding about the concept of partnership. Even if SHIA emphasises the importance of the relationship, or the partnership, we do not see much tangible work aimed at strengthening the relationships.

In those cases where we have assessed the relationship as strong, we have seen the opposite. There has been a deep personal relationship between individuals in both the organisations. There was a very good awareness of who the relationship was being maintained with, and that the relationship was more important than the individual project. An interesting detail is that the strong relationships tend to be where the real responsibility lies at local level in the Swedish association.

1.5 Summary of Conclusions

Relevance and implementation

SHIA's target group is people with disabilities that organise themselves to improve their ability to demand their rights. This target group and focus is completely in line with the objectives of the NGO appropriation. Consequently, *SHIA's objective*, what it wants to achieve, is very relevant for funding from the NGO appropriation.

In line with SHIA's objectives, the associations usually choose to cooperate with organisations of people with disabilities. Approximately two-thirds of the *local cooperating organisations* in our selection are very relevant organisations of this particular type. But sometimes something goes a bit wrong already at the stage of choosing a local cooperating organisation. Schools, hospitals, expert organisations or projects without a local partner are not what SHIA says it wishes to cooperate with, nor do the parties fulfil the requirements for being relevant local cooperating organisations. Nevertheless, they have been chosen as cooperating organisations in approximately a third of the cooperation projects.

In our opinion, not all of SHIA's members accept that the main reason for this is that SHIA's operational objective is to enable people with disabilities to form and develop their own organisations.

SHIA's next step towards attaining its objective is to design specific *contributions*, projects. When we assessed the relevance of the projects in relation to SEKA/NGO's objectives and strategies, we felt approximately half of the projects were very relevant. Many of the less relevant projects involved the

less relevant cooperating organisations as described above, whose support also proved to be less relevant. However, the projects involving some relevant organisations were also assessed as less relevant.

It is also important to note that if we instead had based the assessment on SHIA's own objectives, restricting the criteria to the objective of strengthening organisations, the results would have been even more negative. A number of projects that did not primarily focus on strengthening organisations would then have been assessed as less relevant.

The final step on SHIA's route to attaining its objectives that we evaluated was how well the projects have been *implemented*. Our assessment was that only a quarter of the projects we selected had been well implemented. Even if we excluded the non-relevant organisations, where the implementation also often proved to be weak, over a quarter of the selected projects in the category still were weak. These were the projects run in collaboration with relevant local cooperating organisations, but which had been implemented less successfully or poorly.

Consequently we see a falling scale from relevant objectives to a selection of some less relevant local cooperating organisations. The next step is an even greater number of less relevant projects and finally a large proportion of poorly implemented projects.

This shows that there is a great need for improvement. The objective is correct, but there are deficiencies in the implementation.

SHIA's mandate

There is a discrepancy between what SHIA states in different documents it will do, and what is done in practice. Nearly all the deficiencies we have seen depend on deviations from SHIA's own documented focus and its own policy.

We feel that this is because SHIA (i.e. its board and staff) has not been given an all-embracing and development-oriented mandate from its member associations. Instead, SHIA has only been given an administrative mandate – to administer and channel funding.

Because the associations have not given SHIA the necessary mandate, the office management has chosen to try to make gradual changes. This sometimes leads to conflicts with the associations. However, the associations have not been specifically asked if they are prepared to give SHIA the mandate the operation requires if it is to reach its own objectives and meet Sida's requirements.

Why is the situation like this? SHIA is a democratic organisation that is owned by its members. If the associations wish to engage in development cooperation with public funds, it is the members' responsibility to give SHIA the mandate required. One explanation is the associations' weak ownership of SHIA. Often, the associations do not see that they own SHIA. Instead they regard SHIA as a Sida organisation and feel that Sida has given SHIA a task to perform in relation to the associations. Another reason for the associations' weak ownership is that development cooperation is a peripheral and challenged activity in many associations.

2. Introduction

2.1 Background and Purpose

2.1.1 Background

A considerable proportion of the funds for Swedish development cooperation are channelled through Swedish NGOs. The objective of Sida's support through these organisations is formulated in a policy to promote the development of a vibrant and democratic civil society in the partner countries. People are to have the opportunity to work together to influence the development of society and/or improve their living conditions.

The Swedish Organisations of Disabled Persons International Aid Association (SHIA) has been one of Sida's framework organisations since 1981. Sida is monitoring its support to SHIA, and this evaluation is part of it.

Sida's unit for cooperation with Swedish non-governmental organisations, SEKA/NGO, commissioned Jarskog Konsult for this evaluation. Anders Ingelstam (Acumenta), Håkan Jarskog, (Jarskog Konsult) and Cecilia Karlstedt (Cecilia Karlstedt Consulting), carried out the evaluation. Lennart Peck (Boman & Peck Konsult) was responsible for quality assurance.

2.1.2 Purpose

Sida's terms of reference, dated 22-02-2006, governed the evaluation, whose main purpose was

- To assess the relevance in SHIA's programmes for development cooperation.

In this evaluation, a "relevant" programme means that SHIA, its member associations and local partners are working towards SEKA/NGO's objectives. The evaluation was based on this objective, which has governed our work. SEKA/NGO has further developed the objective in Sida's policy regarding the civil society, as described above. In SEKA/NGO's proposal for new guidelines the objective is formulated as follows:

To promote the development of a vibrant and democratic civil society that strengthens the opportunities for poor people to improve their living conditions.

A subordinate objective in the evaluation has been to assess how SHIA's development cooperation impacts the organisation's work on communication.

Method

We have assessed the relevance in SHIA's programme for development cooperation by looking at the following in relation to SEKA/NGO's objectives:

1. The relevance in the three parties in the cooperation chain: SHIA, Swedish member associations and local cooperating organisations;
2. The division of roles between the parties and what each contributes to the cooperation;
3. Relevance in the Sida-funded projects;
4. How the working methods of SHIA and the member organisations contribute to the activities, and how they improve the chances of successful results in the projects.

2.1.3 Clarification and changes in the assignment

In the introductory meetings with Sida and SHIA, a number of points were clarified for the evaluation and some changes were made to the terms of reference. These changes were documented in the introductory report, which was approved by Sida and SHIA. The most important clarifications are described below:

Partnership: Partnership, defined as a relationship that satisfies certain criteria, is seen as one of the working methods applied by the organisation. In the evaluation we appraise SHIA's different working methods and so the assignment differs from that of a partnership evaluation, which only appraises this working method. Consequently, this evaluation is not a partnership evaluation, as was originally intended. This evaluation includes an assessment of the partnership as a working method.

Evaluation of activities: This evaluation focuses primarily on the activities of SHIA and its cooperating organisations, i.e. what is done and how it is done, in order to assess the quality of the development cooperation. The evaluation does not assess fulfilment of objectives or effects of the projects funded by Sida.

Title of the evaluation: In the terms of reference, the evaluation is called "An evaluation of SHIA's partnership model and the roles and work of partners". The title is somewhat misleading in view of the changes that were made to the assignment, and has been changed to "An evaluation of SHIA's activities and cooperation relationships".

Objectives of the NGO appropriation: We have only evaluated SHIA's activities in relation to the objectives of the NGO appropriation. SHIA may well also have other objectives that are not part of the NGO appropriation. If SHIA does more than SEKA/NGO requires, this has not had a negative impact on our conclusions. However, we have not commented on these other objectives, if any. It is only when activities supported by the NGO appropriation have been used to attain other objectives than SEKA/NGO's objectives that the evaluation's conclusions are affected negatively.

2.2 SHIA

SHIA, the Swedish Organisations of Disabled Persons International Aid Association, is a non-profit association that was formed in 1981 during the UN's international year of the disabled. SHIA's purpose is to support the member organisations' aid programmes in developing countries.

SHIA has 26 member associations. According to SHIA's regulations, associations that want to promote SHIA's purpose can become members. We have divided the 26 associations into the following groups, based on the degree of involvement in development cooperation:

Very active associations	5
Associations with one or two projects of their own	10
Associations that only participate in regional projects	8
Associations with no involvement	3

Just over half of the associations are active, and a few are very active, while just under half have limited or negligible involvement in international activities. Three associations account for approximately two-thirds of the SHIA project portfolio. The level of involvement in international development cooperation therefore varies considerably among SHIA's members.

Many of the associations are organised at three levels: national, regional and local. The associations can choose to place operative responsibility for a project at any of these levels. SHIA's register of contact persons shows that, in the current projects, regional and local levels comprise 30% while responsibility is at national association level for 70%.

SHIA's work is based on the premise that when people with disabilities join forces, they gain in strength. Together, they can demand their human rights, and thereby be seen as people in the fullest sense of the word. It is felt that organisations of people with disabilities play a decisive role in the work to include people with disabilities in all parts of international development cooperation.

SHIA's member associations support around 60 projects in over 20 countries. The projects are primarily aimed at increasing the capacity of organisations of people with disabilities, or at directly strengthening people with disabilities. SHIA calls this latter category of projects individual-strengthening.

3. Method

We carried out the evaluation in five clearly defined steps:

1. Define concepts and decide on formulation, documented in an introductory report.
2. Decide on evaluation criteria.
3. Select projects to study.
4. Collect data.
5. Analyse the information and draw conclusions.

3.1 Define Concepts and Decide on Formulation

To ensure that we were in agreement with Sida and SHIA on important definitions and formulations, our first step was to define key concepts and to decide on important formulations. We did this in collaboration with both Sida and SHIA. The concepts are described in our introductory report, which defined how the assignment would be carried out. The concepts and formulations we discussed are central, both for what we were to evaluate and sometimes for how we were to evaluate. Below, we describe the most important ones

- The concepts of vision, objective, strategy and working method are sometimes vague and can be interpreted in different ways. We formulated our own working definitions of them for this evaluation. See *Appendix 3. Definitions of concepts*.
- Relevance is a key concept in this evaluation. The main purpose of the evaluation is to assess the relevance in SHIA's programme for development cooperation. More specifically, we have assessed the relevance of the organisations involved as players receiving support from the NGO appropriation and the relevance of the projects funded by Sida. Relevance, too, can be interpreted in many ways, so we defined the concept of relevance for this evaluation. This is documented in our introductory report. See *Appendix 3. Definitions of concepts*.
- SEKA has developed four strategies, whose purpose is to make the objectives of the NGO appropriation more precise. The strategies are based on different development roles that the civil society can play. We have used the strategies to assess the relevance of the local cooperating organisations and the relevance in the projects. However, the strategies are broad and vague, and required interpretation. We gave the strategies operational application in accordance with SEKA's instructions about interpretation, and made the necessary further interpretations after discussions with SEKA/NGO. See *Appendix 3. Definitions of concepts*.

- Based on SHIA's own documents, and in collaboration with SHIA, we agreed on the formulations of SHIA's vision, objectives, strategies and working methods. See section 4.1 *SHIA's relevance*.

3.2 Decide on Evaluation Criteria

We defined assessment criteria for the different areas that we have evaluated. The criteria indicate the extent to which SHIA lives up to its objective or ambition in the specific area.

For example, when we assessed whether or not a local cooperating organisation is relevant, one of the criteria was the extent to which “the work of the organisation is based on needs and problems of people with disabilities”.

In most cases, the criteria cannot be assessed as “either – or”, so we have assessed every criterion as either “weak”, “medium” or “strong”.

The assessment criteria that we have used for the different areas are shown where we have presented the assessments in the report. Our assessment templates are shown in Appendix 5–7.

3.3 Select Projects to Study

We have to draw general conclusions about SHIA's development cooperation. Consequently, we selected cooperation projects for the evaluation primarily in relation to how representative they were of SHIA's working method. We thereby avoided the cooperation projects that deviate from SHIA's normal working method with local cooperating organisations, even if these exceptions comprise interesting subjects of study. Nor did we try to find cooperation projects that were especially successful or unsuccessful.

We have assumed that there is a main focus and a main perspective in SHIA's development cooperation. Within this focus, there are a number of factors that lead to differences in working methods and possibly also the content of the projects. We then used these factors, approved by SHIA's management, as selection criteria when choosing which projects to study.

Selection criteria

Our selection criteria have been:

1. *Focus of the project.* The focus of the project can be either to strengthen the organisation or the individual.
2. *Type of local cooperating organisation.* The local cooperating organisation can be a national, local, support, or international organisation for disabled people.
3. *Length of cooperation.* The cooperation can have been going on for a long time (more than ten years) or for less than ten years.
4. *Type of Swedish member association.* The Swedish member association that is responsible for the project can be national, regional or local.

Our assessment of the roles of the different players included all Swedish member associations. The document study of projects included almost half of SHIA's projects.

In addition to document studies we also examined a somewhat smaller number of projects by interviewing member associations and visiting local cooperating organisations. In addition to the criteria above, we added two extra criteria:

1. *Only SHIA's future programme countries.* By only visiting the cooperation projects in SHIA's fixed programme countries, we focused on the nature of SHIA's work in the future rather than what it has been like up to the present.
2. *Practical considerations.* We included practical consideration when selecting projects, such as available travel connections, safety, and our own language skills.

Selected projects

Based on the criteria above, we selected 29 projects to include in the evaluation:

- Projects in 15 different countries are represented. In addition, there are two regional projects and one global. We visited seven countries.
- We visited 16 of the 29 projects.
- 13 different member associations were represented in the projects we studied. We conducted in-depth interviews with seven of the member associations.
- 30 different local cooperating organisations are represented in the projects we studied. We visited 17 of these cooperating organisations.

One of the projects included in the evaluation, one that we also visited, was in such an early phase of planning that we could not make an assessment. In reality, 28 projects have therefore been included in the evaluation. These are shown in *Appendix 4. Projects studied*.

One important aspect in the selection is that a small number of associations account for a very big proportion of SHIA's projects. Three associations conduct approximately two-thirds of the projects. These three associations account for just over half of the 29 projects included in the assessment. Consequently they represent a somewhat smaller proportion of our selection than they do of the entire SHIA project portfolio. Of the projects we visited, the three associations are implementing 80% of them, i.e. a percentage higher than the one applying to the entire project portfolio.

3.4 Collect Data

In order to make our assessments, we have

- interviewed employees at the SHIA office and members of the SHIA board;
- Conducted in-depth interviews with seven member associations. In 4 of these associations, we have also interviewed representatives at regional and local levels;
- conducted a survey directed at all member associations; 18 associations responded, of which 16 were from national level and 8 were from regional or local level;
- interviewed 17 local cooperating organisations in seven countries;
- Studied SHIA's documentation pertaining to 29 different projects. The documentation related to the project period 2004–2006.

In addition, we interviewed other relevant people in the partner countries we visited, and representatives of SEKA/NGO at Sida.

3.5 Analyse the Information and Draw Conclusions

Using the data gathered, we made analyses and assessments at different levels and in different dimensions, and drew conclusions from the analyses. These analyses and conclusions are presented in the following chapters:

4. The relevance of the organisations
5. The roles of the organisations and their contributions to the activities
6. The relevance and implementation of the projects
7. The cooperation relationship between Swedish associations and local cooperating organisations
8. Summary of conclusions

4. The Relevance of the Organisations

The main purpose of this evaluation is to assess the relevance in SHIA's programme for development cooperation. Relevance is a relative concept – the relevance can vary depending on what is used as a yardstick. Because this evaluation is based on the objectives of the NGO appropriation, it is from that perspective that we assess the relevance in the three types of organisations that are involved in SHIA's development cooperation:

- SHIA
- Swedish member associations
- Local cooperating organisations.

For SHIA and the Swedish associations we use their own objectives as a criterion for relevance. For the local cooperating organisations we also assess the relevance based on legitimacy and the focus of the activities.

4.1 SHIA's Relevance

In assessing SHIA's relevance, we are assessing the organisation in itself so that we treat SHIA as a separate unit, independent of its individual members, the Swedish associations.

SHIA's objectives

We start by assessing whether SHIA is a relevant organisation in relation to the NGO objective. We do this by comparing SHIA's vision, overall objective and operational objective with SEKA/NGO's objectives.

SHIA formulates its vision and its objectives as follows:

- *Vision.* A society in which all people's equality and rights are respected and where full participation, equality and respect for human rights prevail.
- *Overall objective.* To improve the living conditions of disabled people.
- *Operational objective.* To strengthen the opportunity for people with disabilities to form and develop their own organisations.

SEKA/NGO's objectives are formulated as follows:

- To promote the development of a vibrant and democratic civil society that strengthens the opportunities of poor people to improve their living conditions.

Are the objectives, strategies and working method logically related?

In the next stage, we assess the logic in the objective-strategies-working method chain. Are SHIA's vision and the two levels of objectives logically related? Do SHIA's strategies and working method result in the attainment of the objectives? The chain is as follows:

1. *Vision.* A society in which all people's equal value and rights are respected, and where full participation, equality and respect for the human rights prevail.
2. *Overall objective.* To improve the living conditions of disabled people.
3. *Operational objective.* To strengthen the opportunity for people with disabilities to form and develop their own organisations.
4. *Strategies.* SHIA has identified three strategies for developing organisations:
 - Develop capacity – to increase the organisation's administrative capacity and to strengthen the organisation's base.
 - Strong individuals – because strong organisations need strong individuals.
 - Opinion forming – directed towards members or towards external target groups to show the potential of disabled people, to emphasise rights and to draw attention to violations and discrimination.
5. *Working method.* Two working methods are central in SHIA's work:
 - Using the clearly defined steps in the project cycle
 - Ensuring that the cooperation between the Swedish party and the local party is in the form of a partnership. By partnership, SHIA means that the relationship fulfils certain qualitative criteria.

Conclusions – SHIA's relevance

Are SHIA's objectives relevant? Our view is that SHIA's objective fits well with the NGO objective. SHIA focuses on people with disabilities, not the whole of society. A focus on SHIA's own specific target group seems to be a natural working method.

SHIA does not focus explicitly on improving the living conditions of poor people, but has been able to show that the majority of the people with disabilities in the partner countries are poor. They are often very marginalised and lack control over their own lives. We therefore are of the opinion that SHIA's target group is very relevant in relation to the NGO objective.

Are the objective, strategies and working method logically related? SHIA uses the word "all" in its *vision* so our interpretation is that the aim is to improve the situation for the majority of people in the target group in the countries in which activities take place. The vision is not to improve the situation for a small select group, but to have a wider impact instead. The vision also has a clear rights perspective.

The *overall objective* has a clear logical link to the vision providing that the general wording "disabled" refers to "the large majority of people with certain disabilities in selected countries".

With its *operational objective* SHIA shows clearly that it has chosen to improve the living conditions for "the large majority of people with certain disabilities in selected countries" in a specific way: by strengthening their opportunities to form and develop their own organisations.

Therefore the goal of SHIA's operation is clear: organisations are to be formed and developed, and this is to be done by giving people themselves the opportunities to form and develop their own organisations.

This is a logical objective in view of the fact that SHIA's members are organisations for disabled people. They have the expertise and experience to help in the work to form and develop organisations.

SHIA has formulated *three strategies* to attain the objective of “strengthening the opportunity for people with disabilities to form and develop their own organisations”:

- *Capacity development* is a logical and uncontroversial strategy that, correctly executed, will strengthen people's opportunities to form and develop their own organisations.
- *Strengthen individuals* is not as logical and is more controversial. The risk is that the associations themselves take the initiative for activities when really the intention is that the cooperating organisations are responsible: to improve the living conditions of their members. We feel that the argument that individuals first must be strengthened before they can function as members in an organisation is flimsy unless there is a close link between the strengthening of the individual and the organisation that is to be developed. If not, the result may easily be that the strengthened individuals never come into contact with the organisation.

In order to show a clear link between this strategy and the objective of strengthening people's opportunities to form and develop their own organisations, SHIA's support must be used to strengthen the cooperating organisation's own capacity to offer its members the service in question, or that the organisation influences another party to offer the service. There must be a very strong link between the organisation and the service, such as regular contact between the organisation and everybody that receives the service.

- Opinion shaping is the least precise of SHIA's three strategies. It is difficult to understand who is to influence who. This is also the strategy that is least developed, and few projects contain this element to any great degree.

In order to see a clear link to SHIA's objective, SHIA's support must be used to strengthen the cooperating organisation's own capacity to implement the lobbying work. The associations should avoid direct lobbying of any party on behalf of the members of the cooperating organisations.

As a *consequence* of our argument above, we do not see three strategies whose purpose is to fulfil SHIA's objectives. Instead, we see just one strategy, capacity development, that is aimed improving the cooperating organisations' own ability to perform their perhaps most important tasks, i.e. to strengthen their members as individuals and to influence the surrounding world for the benefit of its members. If the strategies are to have a logical link to the operational objectives, the projects must never lose their focus on the local cooperating organisations.

The link between the *two working methods* that we have identified and the strategies is not completely obvious. Does the working method really lead to optimal implementation of the strategies?

Working according to clear steps in *the project cycle* will, in all likelihood, lead to consistent implementation of the strategies, assuming that the steps are correct and are implemented as intended. Consequently, there is a logical link to the strategies, but with the two important reservations.

Working according to certain criteria to produce what is to be regarded as a *good relationship*, often called partnership, is not as clearly linked to the strategies. Is it important to create a close relationship between organisations in order to strengthen the cooperating organisation's capacity? This is the hypothesis from which SHIA, and most parties in the aid, work. However, few, if any, have been able to prove that “partnership” as a working method produces better results. We will try to test this hypothesis in our evaluation.

4.2 The Relevance of the Swedish Associations

Because SHIA is an umbrella organisation whose individual associations carry out their activities independently, the individual associations are not automatically relevant simply because they are members of SHIA. Consequently, we are assessing the relevance of the associations separately.

The objectives of the Swedish associations

In order to assess the relevance of the Swedish associations in relation to the NGO appropriation, we studied whether their objectives for their international work were in accordance with SHIA's objectives. We found the following:

- 20% indicated that SHIA's overall objective of improving the living conditions of disabled people is the objective of their international activity.
- 40% of the associations indicated that SHIA's operational target of strengthening the opportunities for people with disabilities to form and develop their own organisations is the objective of their international activity, or report this objective in combination with SHIA's overall objective above.
- 40% of the associations lack an explicit objective for international activities.

Conclusions – the relevance of the Swedish associations

Of the associations, 40% have an objective that is in agreement with SHIA's operational objective of strengthening the opportunity for people with disabilities to form and develop their own organisations. It is also these associations that are responsible for most of the projects. SHIA's operational objective is not well supported among other members.

It is remarkable that such a large proportion as 40% of the associations lack objectives for their international activities. This is an indication that many associations give the international activity a low priority.

Some of the associations with limited international activities regard SHIA's overall objective, to improve the living conditions of disabled people, as their operational target. We see two reasons for this:

1. The logical link between SHIA's two objectives has not been made sufficiently clear to the member associations, and so the overall objective and the operational objective are experienced as two parallel and alternative objectives.
2. We find the other reason in the type of member associations. Certain groups of people with disabilities that we see as separate groups in Sweden are not regarded as separate groups in the partner countries. Because they are not regarded as separate groups, it is difficult for them to form organisations. Consequently, it is not obvious that the projects are aimed at forming corresponding organisations.

There are clear risks involved in working directly towards the overall objective, to improve the living conditions of disabled people, instead of towards the operational objective, to form and develop organisations. This can result in:

- Projects being designed to strengthen the state's provision of certain social services, instead of strengthening the civil society to put pressure on the state;
- Focus being put on helping just a few people, i.e. the individuals that are directly helped by the project;
- The Swedish association involving itself and conducting its own activities instead of forming or strengthening a local organisation to gradually build up its own activities. This again misses the target of strengthening the civil society.

SHIA's objective is in agreement with SEKA's objective. The three-fifths of SHIA's members that do not use SHIA's operational objectives need to decide whether they can work in accordance with SHIA's operational target. Those who decide it is not possible are not relevant players, either in relation to SHIA's or to SEKA/NGO's objective.

4.3 The Relevance of the Local Cooperating Organisations

Last in the chain is perhaps the most important link, the local cooperating organisations. We have assessed the relevance of the local cooperating organisations based on the criteria below. Our template for the assessments is shown in *Appendix 5. Assessment template for the relevance of the local cooperating organisations*.

Assessment criterion	Weak	Average	Strong
Agreement with objectives	6	4	17
Does the organisation's overall objective agree with the SEKA/NGO objective?	22%	15%	63%
Legitimacy	1	6	20
Is the work of the organisation based on the needs and problems of people with disabilities?	4%	22%	74%
Legitimacy	6	8	13
Does the organisation have a structure that creates a relationship with the people it represents that promotes transparency and allows them influence over the activities?	22%	30%	48%
Core activity	12	10	5
To what extent does the core activity of the organisation fall within SEKA/NGO's Strategy 1: Conduct national or international lobbying?	44%	37%	19%
Core activity	2	12	13
To what extent does the core activity of the organisation fall within SEKA/NGO's Strategy 4: Conduct social activities and/or empowerment work for people with disabilities?	8%	44%	48%
Overall assessment of the relevance of the local cooperating organisation, based on the criteria above.	5 19%	6 22%	16 59%

In one case, our assessment was that there was no local cooperating organisation. In that particular case, we gave the assessment "Weak".

In two other cases, there was insufficient information in SHIA's documentation on which to base an assessment of the organisations. These two organisations were not included in the assessment.

Consequently, a total of 27 local cooperating organisations were assessed.

Conclusions – The relevance of the local cooperating organisations

SHIA and the associations largely cooperate with relevant local cooperating organisations. The large majority are organisations by and for people with disabilities. Working with these organisations is fully compatible with SHIA's intentions and also with SEKA/NGO's priorities.

The organisations for which our overall assessment is "weak" or "average" fall mainly into two categories:

1. state organisations
2. support organisations that are not member-based, often based on specialist expertise.

Neither of these two categories is really able to operate according to the criteria for relevant organisations. Their objective is not to strengthen the civil society, they do not have natural mechanisms to give the target group influence and state organisations are not involved in lobbying work anyway.

It is important to emphasise that the type of state organisations to which we are referring here are state service organisations, such as hospitals and schools. We have assessed as more relevant member organisations of people with disabilities where the organisation has a close link to the state.

Apart from the exceptions above, the local cooperating organisations very largely have objectives that agree with those of Sida and SHIA, and their work is based on needs and problems of people with disabilities. However, even if they are member organisations, internal democracy and member influence is sometimes weak and they also conduct very few activities relating to opinion shaping and lobbying.

4.4 Summary of Conclusions and Recommendations – the Relevance of the Organisations

SHIA's relevance

We assess SHIA's objectives as relevant in relation to Sida's NGO objectives. SHIA's objectives at different levels are also logical and logically related but the logical link needs to be made more precise in the regulations. This would make clearer SHIA's focus on strengthening organisations.

We feel that SHIA's three strategies for attaining its objectives do not logically lead to attainment of the operational objective. For logical compatibility with the objectives, only one of the strategies should be retained, and the other two should be the strategies of the local cooperating organisations.

We recommend that

- SHIA reformulate its objectives in the regulations to give a clear focus on its objective to improve the living conditions of disabled people through disabled people forming and developing their own organisations.
- SHIA define organisational development as its single strategy for attaining its operational objective.

The relevance of the Swedish associations

SHIA's activities are directed towards marginalised groups in society, to enable them to influence their own situation by forming organisations. Swedish member associations whose work agrees with SHIA's operational objective, to form and strengthen this type of organisation, are relevant players in the cooperation chain. For the associations that are responsible for most of SHIA's project portfolio, the objectives correspond completely with SHIA's operational objective.

But three-fifths of SHIA's member associations do not share, or have not taken a position on, SHIA's operational objective, and this is a problem. These associations that do not work in accordance with SHIA's operational objective are not relevant players, in relation to neither SHIA's nor SEKA/NGO's objectives.

We recommend that SHIA's board initiate dialogue with the member associations and explain the NGO appropriation and SHIA's objective. If the majority of SHIA's members evidently do not share these objectives, the matter must be brought up at SHIA's annual general meeting. One alternative is that SHIA broadens its funding beyond the NGO appropriation and formulates further operational objectives.

The relevance of the local cooperating organisations

SHIA largely follows its principle of cooperating with organisations of people with disabilities. Consequently, we assess most of the local cooperating organisations as relevant. In those cases where the cooperating organisations are less relevant, SHIA has generally deviated from its principle above and is cooperating instead with other types of organisations.

We recommend that SHIA consistently apply its principle of cooperating with organisations of people with disabilities, and that it should not collaborate with state organisations or with expert organisations that are not member-based.

5. The Roles of the Organisations and their Contributions to the Activities

In development cooperation, every organisation in the cooperation chain contributes in different ways to the work to make change possible in the partner country. Every organisation in this chain must be able to describe why it is participating and how it looks upon its own role. In this section we appraise role division and contributions to the activities by the three organisations involved: SHIA, the Swedish member associations and the local cooperating organisations. We study their overall roles and contributions, and the practical division of roles in the project work.

5.1 SHIA's Roles and Contribution

Naturally, SHIA consists of the members, i.e. the member associations. When we use “SHIA” here, we are mainly referring to the SHIA office and, in certain cases, the board.

5.1.1 SHIA's overall roles and contribution to the activities

One of SHIA's basic working methods is that the work is to be conducted in partnership between Swedish associations and organisations in the partner countries. SHIA does not define itself as a partner in this relationship on the grounds that SHIA can never be a partner because it does not share the disability and the actual experience of being marginalised. The associations do not define SHIA as a partner either, but as a “facilitator”. The local cooperating organisations sometimes regard SHIA as a partner, or see SHIA and the member associations as the same party, particularly in cases where the Swedish association is passive.

SHIA's office has defined its main task as facilitating the international cooperation for the associations and the local cooperating organisations. Based on this aim, SHIA's office in recent years has worked on formalising the project cycle and clarifying the division of roles within it.

In our survey the associations stated two main roles for SHIA:

- To contribute funding to the projects
- To contribute with expertise regarding assistance work.

Financial support for projects is nothing controversial, as long as the money comes from Sida. As dispenser of Sida funding, SHIA is seen as the funding body. SHIA could also distribute funds other than those deriving from SEKA's NGO appropriation. The first step towards this are the discussions about fund-raising that have been held with the associations. However, SHIA's involvement with fund-raising has proved to be such a controversial issue at present, and so it has been postponed.

SHIA's tasks in *the role* of contributing expertise to aid are primarily as follows:

- Provide administrative service. Many associations have limited administrative capacity, and international issues are not high on their own agendas. In spite of this, SHIA's office sees its role as one of providing administrative support to enable them to participate in development projects. The reasoning is that, by relieving the associations from administrative burdens, the associations can devote their limited time to the content of the cooperation projects. SHIA's administrative role extends to developing and providing information about administrative procedures and forms, managing finance, providing a travel service to associations, handling communications, in certain cases assuming operative project management responsibility, or even acting as ghost writer in applications on behalf of associations with weak administrative capacity.

- Act as professional support. A role that has developed in recent years is for SHIA officers to support the project managers in the associations. This role involves discussing details of the project, acting as a sounding board, contributing with hints and ideas about how the project can be designed, and to provide advice about possible resource personnel.
- *Provide skills enhancement.* SHIA offers a limited selection of training activities. Courses and seminars are usually customised for specific occasions or themes. The member associations are requesting that SHIA's office provide training more continuously in order to develop and broaden the associations' ability to participate in international development cooperation.
- *Act as coordinator.* Several associations want SHIA to take a more coordinating role. It should bring together associations working in the same countries, or with the same issues, in order to increase the sharing of experiences and cooperation. SHIA has acted as coordinator in such a way on only a few occasions.
- *Assure quality.* To ensure the quality of the activity, SHIA needs to appraise projects, check the implementation, provide overall general management, and enable all parties to learn from what is being done and apply what has been learned. SHIA's office and board must assume this quality assurance role, both for the development of the associations and to satisfy the requirements that Sida places on SHIA as a framework organisation. SHIA's role as quality guarantor is not supported in the associations.

Finally, SHIA's office plays a few external roles, nationally and internationally. Examples of these are the providing of information in Sweden, conducting its own lobbying work to encourage the UN and Swedish support organisations to introduce the issue of disabled people, and to building up cooperation with European sister organisations. We have not assessed how well SHIA's office plays these roles because this is not within the remit of this evaluation.

Conclusion – SHIA's overall roles and contribution to the activities

There is a potential conflict between the associations' involvement and SHIA's provision of *administrative service*. The bigger the role taken by SHIA's officers, the smaller the role and responsibility that are taken by the association. The boundaries for what SHIA's officers are to do for the associations have not been defined. Through the goodness of their hearts, and fear of making demands on the associations, many officers do too much. At the same time, certain associations consider SHIA as being "too high-profile and taking over the cooperation".

Roles that mean that SHIA takes over most of the project administration are unsuitable, so SHIA's officers should not take responsibility for project management or write applications. When it does so, SHIA's office becomes an active partner in the cooperation and undermines the responsibility of the association. Certain associations lack expertise and capacity but the solution to the problem is not that SHIA's officers take on an operative role; instead, the associations should take responsibility for their own participation and SHIA should provide even more support and facilitation.

The officers' competence at providing *professional support* varies. The degree to which associations accept SHIA's provision of professional expertise for the content of the projects also varies. This is the cause of conflicts between SHIA's office and certain associations. From a development perspective, SHIA's mandate to have an opinion on the content of the associations' projects is not clear.

SHIA's roles as *trainer and coordinator* are undeveloped. SHIA's office has great capacity to enhance the skills of the associations. It can do this by providing a continuous training programme for associations, based on support methodology, thematic issues and how to work in partnership. SHIA could also to meet the associations' request to develop common expertise through discussions in country or theme groups. Working within a country programme can be a useful tool for developing coordination.

SHIA's management has not given the officers sufficient information and support about how to balance the different roles. There are big differences in how the officers have interpreted their role and consequently in how to work. Some officers take a purely administrative role. Others take a supervisory role, while still others see themselves primarily as dialogue partners.

The role that is least developed is that of *quality guarantor*. Our assessment is that the role is not fulfilled satisfactorily. The officers' appraisal of applications is not consistent, the board does not take the consequences of the appraisals made by the office, projects are evaluated very rarely, and there is seldom an analytical final report. Respect for the associations' independence results in the SHIA's office being too cautious in assuring a high quality in the operation.

Some associations see SHIA as a "Sida organisation" that works for Sida, rather than as an independent association that gets its assignments from the members. Its members have not given SHIA a clear mandate to take on the appraisal and quality assurance role.

Managing its activities to attain good quality is an obvious role for a board. This has not been the case at SHIA. The board's ambition in recent years, greater management of activities, has met with a lot of opposition among the associations because this, by tradition, has been perceived as the associations' responsibility. Because of this SHIA's board has not taken a management role in relation to the office and associations. This can be seen, for example, in the board's caution in rejecting projects, sometimes in direct conflict with the office's recommendations. However, the decision adopted by the annual general meeting to introduce country programmes is a first step towards managing the activities in order to achieve greater impact.

We have received many opinions on what SHIA does, should do, and can do. In many cases, associations want more, and different, things of SHIA than is the case today. SHIA's office does not contribute as much to the activities as the associations expect. This reflects the vastly different needs of the associations, but above all, the incomplete nature of SHIA's mandate. SHIA's office sees the need for taking roles for which it does not have the mandate.

5.1.2 SHIA's roles in the project work

SHIA has formalised the project cycle and defined the division of roles in each step. SHIA's project cycle consists of the following 12 steps:

1. Preliminary planning
2. Prepare project application
3. Assess project application
4. Continually prepare plans of operations
5. Continually assess plans of operations
6. Conduct project activities
7. Continually prepare project reports
8. Continually assess project reports
9. Ongoing monitoring of project
10. Prepare final report
11. Assess final report
12. Evaluate

In the document studies of the project cycle for the period 2004–2006 we reviewed whether all steps have been implemented, and if there was compliance with the defined role division. Of the 12 steps, it is SHIA's responsibility to:

- Assess project applications
- Continually assess plans of operation
- Continually assess project reports
- Participate in ongoing monitoring
- Assess final reports
- Conduct evaluations, in collaboration with member associations and local cooperating organisations

We have the following impression of how SHIA carries out its work:

- *Assess the project application.* SHIA's officers (a person other than the officer responsible) have assessed all applications in writing, using fixed criteria, before they are presented to the board for a decision. SHIA's office has further developed this process before the applications in 2006.
- *Continually prepare plan of operations.* The local cooperating organisation usually makes plans of operation continually. However, it is not these plans that the SHIA office uses for administrative purposes; instead the officer produces a plan of operation using the information in the application. These are sent to the parties for approval, and are called plans of operation from then on.
- *Continually assess plan of operations.* When the officers make the plan of operations, the assessment of the plan loses its meaning. However, we have also seen examples of both member associations and SHIA making comments, asking questions, and assessing the actual plans of operation.
- *Assess project reports.* In the majority of cooperation projects, the project report is assessed in relation to SHIA's checklist but, on occasions, officers may simply receive reports without assessing them and without giving feedback to the cooperating organisations.
- *Ongoing monitoring.* SHIA's officers sometimes make follow-up trips, usually together with associations but sometimes alone. Sometimes the associations commission the trips, sometimes not. SHIA's office also has direct communication with the cooperating organisations, but does not always copy, or otherwise, inform the associations. Project reports are usually sent direct to SHIA, often with copies to associations but not always.

This makes it unclear who is responsible for monitoring. Some of the local cooperating organisations that we visited found it difficult distinguishing between SHIA and the association. “*So many people come and ask the same questions*”, said one organisation, a little resignedly.

- *Financial monitoring.* In order to relieve the associations SHIA has taken responsibility for managing the financial monitoring. SHIA's management considers this responsibility to be very specific. However, the associations do not find it so clear-cut. Only one-third of the associations consider financial monitoring to be SHIA's responsibility, one-third see the responsibility as divided between SHIA and the associations, and one-third consider the responsibility as divided between the associations and the cooperating organisations.
- *Final reports.* Final reports are only made when a relationship ends, which is not often. Most projects run in two- or three-year periods, and the completion date is continually put back. The projects may have been running for 15 years. We have only seen two final reports from the period studied, and the SHIA office prepared one of these instead of the local cooperation partner and the association.

- *Evaluations.* Evaluations are done extremely rarely. We have found that only four of the cooperation projects have been evaluated since 2000. Who is responsible for initiating evaluations is not clear.

Conclusions – SHIA's roles in the project work

SHIA's responsibility in the project cycle is primarily in the monitoring and review stages. We have previously stated that the role of quality appraisal is conducted unsatisfactorily. Based on the review of the implementation of the project cycle, we specifically want to draw attention to the following points:

- *Assess the project application.* It is positive that a method of collegial review is used, and that there are fixed assessment criteria. However, in many cases, we have reacted to the assessment made, such as when the partnership is assessed as positive even when there is no cooperating organisation or when the Swedish association is clearly not involved. Therefore we note that assessments are made, but they are not of adequate quality. The assessments are too arbitrary.
- *Continually prepare plan of operations.* By making the plans, SHIA's office takes on an operative role that it should not. A plan of operations converts the intentions in the application into activities. It is not strange that the activities are changed and perhaps must be developed a year later. The local cooperating organisation must take responsibility for this, which it does by planning its operation, both the part that is financed with support from SHIA and the rest of its activities.
- *Assess project report.* Again, the variations in management of project reports show that the officers do not work in a consistent manner and view their role differently.
- *Ongoing monitoring.* Monitoring of the activities must always be the association's responsibility and SHIA's officers should never be involved in this type of activity, neither on their own initiative nor on commission from the association. SHIA's involvement weakens the dialogue between the two other parties, and it means that the parties miss out on the sharing of experiences, and it limits the opportunities for the parties to get to know each other better.
- *Financial monitoring.* We see no problems with SHIA taking responsibility for financial monitoring, but the division of responsibility needs to be sorted out with the associations.
- *Final reports.* The attitude to when final reports are to be done means that all parties miss out on a very important opportunity to lift their sights and learn from drawing conclusions about the activities that are carried out.
- *Evaluations.* In our opinion, it should be SHIA's responsibility to initiate evaluations.

Our observations about SHIA's work in the project cycle confirm our conclusions that SHIA's work on quality assurance is unsatisfactory and that the officer role should be made clearer.

5.1.3 Summary of conclusions and recommendations – SHIA's roles and contribution

Our assessment is that SHIA's office, due to a limited mandate and uncertain management, has taken a narrow administrative, management role in cooperation. SHIA does not provide sufficient support, development and quality assurance in relation to the associations' development cooperation, which would ensure that the associations' projects optimally promote development.

Our appraisal of the different stages in the project cycle shows that role division in most cases is as described in the project handbook, and most stages are completed. A lot of work has clearly been put into this. However, we have seen major deficiencies in both division of responsibility and implementation of all stages relating to quality assurance and the organisations' learning. We have also seen that SHIA's office has moved away from its defined role and instead has taken an operative role in certain stages, which we feel should be avoided.

The clear project cycle that SHIA has developed is vital for successful development cooperation. But we have also seen that it is not enough for the role division to be clear and that the different stages are implemented. The different stages must also be executed in a satisfactory way. Here we note that there are still deficiencies.

We recommend that

- The associations give SHIA a clear mandate to direct the associations' work towards SHIA's objectives by support and appraisal
- SHIA's work with skills enhancement, quality review, management and learning be developed
- SHIA provide in-service training for all officers in their role as officers, providing guidance and follow-up so that the officers' work becomes more uniform and less arbitrary
- The local cooperating organisations' plans of operation be used for planning and monitoring, and that the officers work from these instead of the applications when information is transferred to SHIA's administrative forms
- SHIA's personnel should never, either on their own initiative or on behalf of the associations, conduct ongoing monitoring in relation to the cooperating organisations. All ongoing monitoring should go through the associations, and SHIA's participation must always be in the background
- SHIA's responsibility for financial management is made clear for all parties
- Final reports are made after each completed project period for all cooperation projects. The association and the local cooperating organisation are to prepare the reports jointly. The focus should be on results and what the lessons learned
- Role division in the initiation, planning and implementation of evaluations is made clear

5.2 The Roles and Contribution of the Swedish Associations

5.2.1 The overall roles of the Swedish associations and their contribution to the activities

The Swedish associations are unanimous that their main task in the international cooperation is to *provide ideological and organisational experience* of building up associations of disabled people. The reasoning is that, by contributing with Swedish experience, the local cooperating organisations can be developed more quickly and avoid making the same mistakes as the Swedish party made earlier. Many of the local cooperating organisations also share this view and expect the sharing of experiences concerning operational methods and organisational development.

Further roles mentioned by some Swedish associations and some local cooperating organisations are to:

- *Act as role model.* The Swedish association is a role model that can show that it can take itself out of a dependency and influence its own situation. This applies both for members and for the local cooperating organisation.
- *Give legitimacy and acceptance.* The Swedish association gives legitimacy and credibility to a local cooperating organisation by showing the political establishment in the country that the Swedish party has confidence in it. This can increase its lobbying power and the possibilities of getting state funding.
- *Make contacts.* Identifying and making contacts with possible cooperation partners is an important role. Certain associations also see it as a role to introduce its partners into the world organisations and help them to make international contacts or to facilitate contacts between parties in partner countries to facilitate the sharing of ideas and experiences.

Many of the Swedish associations state that cooperation in partnership creates contributions in both directions, and not just with the local cooperating organisation. Learning and development for the association is promoted, and the lobbying power related to the specific disability is strengthened globally. Another important aspect is that the parties participating get personally stimulating and rewarding experiences.

Finally, some associations state that another of their roles is to send equipment to their cooperating organisations, which is done outside the NGO appropriation.

Conclusions – The overall roles and contribution of the Swedish associations

The associations state that their main task is to contribute with experiences of how to form a movement for disabled people. We have seen a couple of good examples of associations showing this can be done, but our assessment is that the Swedish associations in the majority of the cooperation projects do not systematically contribute with what is said to be their main task.

In our opinion, that the majority of associations do not have a clear view of how they can contribute to bringing about change through their participation in the cooperation. Some of the associations have good awareness, but far from all.

Often there are no specific activities for exchanging experiences about forming and developing associations and operational development. Examples would be joint seminars, use of resource personnel from the association for operational development, and study visits with clear aims to examine tangible and specific operational development.

There are even fewer activities for sharing experiences about how to pursue disablement policy issues. Experiences are shared to varying extents in the cooperation projects, but they primarily take place informally at an annual monitoring visit when only the key personnel in the project meet and many other practical issues have to be dealt with in a short period.

In our opinion, establishing links with potential cooperating organisations works well. An important factor in this is that the contacts are made through each world organisation and can then be incorporated into a SHIA cooperation project.

In our opinion, the degree to which the Swedish organisations fulfil the other rolls depends on the quality of the cooperation relationship. A strong and close relationship produces these contributions more or less automatically, and they can naturally also be strengthened through specific activities. As this evaluation shows, only in a few cases do we assess the cooperation relationship to be a strong partnership.

5.2.2 The roles of the Swedish associations in projects

According to SHIA's defined project cycle, the Swedish associations are responsible for the ongoing monitoring, and implement the following stages together with the local cooperating organisation:

- Preliminary planning
- Preparing the project application
- Preparing the final reports
- Conducting evaluations (together with the local cooperating organisation and SHIA).

We have the following impression of how the Swedish associations carry out their work:

- *Preliminary planning.* The parties conduct joint needs analyses and joint planning, to strengthen the relationship before the project starts. Swedish people outside the associations produced two of the preliminary plans we reviewed.

- *Preparing the project application.* In two-thirds of the projects, the applications were prepared in collaboration between the association and the local cooperating organisation as intended. A lot of effort is put in to the applications. The applications for one-third of the cooperation projects were not made as intended. They were prepared either by the member association, or by some other Swede, with very marginal involvement of the cooperating organisation, or they were prepared solely by the local cooperating organisation.
- *Ongoing monitoring.* It is the associations' responsibility to continually monitor the activities. This is done through annual monitoring meetings, appraisal of project reports, and through continual contact by e-mail or telephone. Because continual communication can be difficult in some associations, the monitoring visits are very important. It is at these meetings that experiences are shared, activities monitored and planned, and the relationship built.
- *Preparing final reports and conducting evaluations.* As noted previously, these stages are poorly executed, and the division of responsibility for initiating evaluations is not clear. We have encountered views in several associations that it is "too expensive to make evaluations because it takes money from the target group".

Conclusions – The Swedish associations' roles in the project work

Our assessment is that the majority of Swedish associations largely work as defined in the project cycle, apart from their lack of understanding of the need to learn from what is being done. The associations that are not active as cooperation partners, and where SHIA's office takes a big role, are reduced to the role of guarantors for funding.

We have the following comments about the Swedish associations' role in specific stages in the project cycle:

- *Pre-planning.* In the two instances where pre-planning has been done by Swedish people outside the associations, the purpose has been missed.
- *Preparing project application.* An application prepared by the member association, or by some other Swede, with very marginal involvement of the cooperating organisation, counteracts local ownership.

5.2.3 Summary of conclusions and recommendations – the Swedish associations' roles and contribution

We feel that the majority of the Swedish member associations do not, in a structured way, contribute in the way intended for their participation in the cooperation projects. In planned activities, together with their local cooperating organisations, they should share expertise, methods and experiences about how to form, run and develop a disablement organisation and its activities.

Our assessment is that many associations have not sufficiently thought through what they are to contribute to the cooperation projects, and how to contribute. At the same time, a small number of associations have worked very actively with this, so the range between the associations is wide.

We recommend that the Swedish associations clearly formulate their own role in the cooperation projects with their local cooperating organisations in order to help share experiences about how to form, run and develop a disablement organisation and its activities. This should be increasingly in the form of planned activities.

5.3 The Roles and Contribution of the Local Cooperating Organisations

5.3.1 The overall roles of the local cooperating organisations and their contribution to the activities

The main role of the local cooperating organisations in the cooperation projects is to conduct their own operation, thereby being useful in different ways to their members. The operation is based on the organisation having an awareness and analysis of the problems it is working with and a belief that society can be influenced.

Through their structures, the local cooperating organisations usually have an obvious link to the target group, people with disabilities, because the organisations are usually by and for people with disabilities. Consequently the problems are experienced first hand by the organisations' administrators. The local cooperating organisations contribute to the cooperation projects with their personnel, their equipment and their contact network.

A quote from an interviewed reference person illustrates what she felt to be the main contribution of a local cooperating organisation: *"They are stubborn in their dream of fighting for the rights of their children and they do it with their hearts"*.

Conclusions – The overall roles of the local cooperating organisations and their contribution to the activities

Our assessment is that the majority of the local cooperating organisations adopt the roles they are expected to take. This has previously been assessed in the section on the relevance of the cooperating organisations. The content of the "poor people's perspective" that is to permeate Swedish development cooperation agrees with the local cooperating organisations' contribution to the cooperation projects.

5.3.2 The roles of the local cooperating organisations in the projects

According to SHIA's defined project cycle, the local cooperating organisations, either themselves or together with the Swedish association, are responsible for the following stages in the project cycle:

- Prepare continuous plans of operation
- Implement project activities
- Prepare continuous project reports
- Prepare final reports
- Conduct evaluations (also together with SHIA).

We have the following impression of how the local cooperating organisations execute their work:

- *Prepare continuous plans of operation.* As mentioned earlier, the local cooperating organisation often makes continuous plans of operation. However, it is not these plans that are used by the SHIA office for financial management and monitoring so there are two parallel systems.
- *Implement project activities.* The local cooperating organisations are virtually always responsible for implementing project activities.
- *Prepare continuous project reports.* This is done as intended but the reports are not always punctual and the quality can be improved.
- *Prepare final reports and evaluations.* We have previously drawn attention to the problem that final reports and evaluations are seldom prepared, and that the division of responsibility is unclear when it comes to initiating evaluations.

Conclusions – The local cooperating organisations' roles in the project work

Based on the above, our conclusions are that the local cooperating organisations are strong owners of the operation and take the roles as intended. The different stages in the project cycle are carried out, but there is scope to improve the quality of their implementation.

5.3.3 Summary of conclusions and recommendations – the roles and contribution of the local cooperating organisations

Our assessment is that the local organisations are largely relevant cooperation partners that run their own operation with strong ownership. Our appraisal of the overall roles of the local cooperating organisations is largely the same as our appraisal of their relevance in section 4.1.3.

6. The Relevance and Implementation of the Projects

6.1 Are SHIA's Projects Relevant?

In order to appraise the relevance of SHIA's projects, we have first considered whether the focus of the projects agrees with the overall objective and strategy of the local organisations. Where projects do not agree, we have assessed the relevance as weak. If we have previously assessed the local cooperating organisation's objective as not relevant, and if the focus of the projects agrees with this objective, we have also assessed the relevance of the projects as weak.

Because this evaluation is based on objectives of the NGO appropriation, the four strategies that are linked to this objective have carried most weight when we appraised the relevance of the projects. The four strategies are described in more detail in *Appendix 3. Definitions of concepts*.

Our appraisal of the relevance of the projects is shown on the next page. Our template for the appraisal is shown in *Appendix 6. Appraisal template for the relevance of the projects*.

Appraisal criterion	Weak	Average	Strong
Compatibility of objectives	6	1	19
How compatible is the focus of the project with the overall objective and strategy of the local cooperating organisation?	23%	4%	73%
SEKA/NGO's strategies	5	9	14
To what extent is the support designed according to the priorities of the NGO objective's strategies?	18%	32%	50%
Strategy 1	3	5	6
Does the local cooperating organisation conduct strategic and structured lobbying using Sida support?	21%	36%	43%
Strategy 2	7	7	3
Does the Sida-supported project develop the local cooperating organisation's capacity to conduct lobbying?	41%	41%	18%
Strategy 4	1	12	12
Does the local cooperating organisation conduct structured and strategic social activities and/or empowerment work using the Sida support?	4%	48%	48%
Strategy 3	9	8	9
Does the Sida-supported project develop the local cooperating organisation's capacity to conduct social activities and empowerment work?	35%	30%	35%

Appraisal criterion	Weak	Average	Strong
Overall assessment of the project's relevance based on the above assessments.	7 25%	8 29%	13 46%

Our assessment of the 28 projects that we have studied.

We were unable to assess how well objectives agreed for two organisations because we could not find any objectives.

Conclusions – Are SHIA's projects relevant?

Using our assessment above it is difficult to reach an overall conclusion of the relevance of SHIA's projects. There is a broad spread of projects with both high and low relevance. It is undoubtedly positive that we have assessed the relevance as “strong” or “average” in 75% of the projects studied.

It is important to point out that our assessment of the projects' relevance is made based on SEKA/ NGO's objectives and strategies. If, instead, we had made the assessment based on SHIA's own objectives, restricting our analysis to the objective of strengthening organisations, the results would have been more negative. In that case, a number of projects that do not primarily focus on strengthening organisations would have been assessed as less relevant.

The most important reasons for our assessment of a project's relevance as “weak” or “average” as the following:

- The most important reason is that the project largely consists of operational support, without developing any capacity in the cooperating organisation.
- In certain cases the project's objectives agree with the local cooperating organisation's objectives, yet we have assessed the organisation's objectives as not relevant. This applies particularly to state organisations. In other cases the cooperating organisation lacks clear objectives. These are often very weak organisations. However, we have seen no cases where the project's focus directly conflicts with the local cooperating organisation's objectives.
- A third reason is that the project does not include support to the cooperating organisation's lobbying work. According to our interpretation of Sida's strategies, such a project cannot be given a higher assessment than average.

6.2 Are SHIA's Projects well Implemented?

In our terms of reference for this evaluation, our assessment extended no further than the relevance of the projects, and we intended to stop there. When we had collected the data, including the visits in the partner countries, we discovered that we had a lot of information about, and a good insight into, how the projects were implemented.

We then decided to make an overall assessment of the implementation of all projects that we had visited. It is important to emphasise that the assessment is more subjective than other assessments in the evaluation, and that it has been done later. The following are a few examples of the factors that we assessed:

- Are the activities carried out those that were planned?
- How well is the project designed (scale, precise activities, do the activities lead to attainment of objectives)?
- In the project design how successful has the cooperation been between the Swedish association, the local cooperating organisation and other parties involved?
- How appropriate is the project organisation's structure?

The results of our assessment are as follows:

Assessment criterion	Weak	Average	Strong
How well has the project been implemented?	8	3	4
	53%	20%	27%

Our assessment of the 15 projects that we studied through visits.

Conclusions – Are SHIA's projects well implemented?

Our conclusion is that too many of SHIA's projects are implemented poorly and assessed as weak. We have assessed more than half of the project implementations as weak, and only a fifth as strong. Even if our assessment of implementation is more subjective and less structured than other assessments, we feel that the conclusion is well supported.

The assessment of implementation is an overall assessment, and is not based on individual assessments of individual factors, so we cannot precisely single out the most important reasons for the poor results. The following is a list of our observations. All of them play a role when we assess a project as being weakly implemented, but we cannot say which of them is the most important:

- The planned activities in the projects have not been implemented.
- The projects are too small to have any effect. An example would be a project aimed at helping an organisation to run a small office, without the organisation being able to carry out any activities.
- Project activities are so imprecise and vaguely formulated that those involved cannot clearly say what the project is to contain or describe different contents.
- There is no logical link between the activities and attainment of objectives, so the projects do not lead to the attainment of the objectives.
- The parties involved do not agree about how to implement the project, and question each other's competence.
- The parties involved, or one of them, does not have sufficient knowledge about the activities that the project is intended to develop. This particularly applies to support to state organisations.
- The Swedish association itself runs the project, or manages it to a very high degree.
- The Swedish association first designs the project and then finds a local "implementer". If the association is not satisfied with its implementer, a new one is found. This can result in several of the points above.

6.3 Summary of Conclusions and Recommendations – the Relevance and Implementation of the Projects

Our assessment is that the relevance in most of SHIA's projects satisfies Sida's requirements. For the least relevant projects the reason is usually clear, the most common being that the project largely consists of operational support without developing any capacity.

If we instead had assessed relevance in relation to SHIA's own objectives, restricting the analysis to the objective of strengthening organisations, the result would have been more negative. A number of projects that do not primarily focus on strengthening organisations would then be assessed as less relevant.

When we have assessed the implementation of the projects, we have come to the conclusion that the implementation is too weak for the project to attain its desired result in more than half of the projects

we have visited. The reasons for the weak implementation are many and diverse, so they are more difficult to correct than the weaknesses in the projects' relevance as above.

To improve the relevance in the projects *we recommend* that

- SHIA place greater demands on all projects having a clear focus on capacity development
- SHIA place greater demands on all projects having a clear focus on strengthening organisations of people with disabilities.

Many of the recommendations that we make in other parts of our report affect the implementation of the projects, and thereby the result. In addition *we recommend* that SHIA should develop criteria that assure the quality of the implementation of the projects, and use these criteria when appraising project proposals.

7. The Cooperation Relationship between Swedish Associations and Local Cooperating Organisations

7.1 How Good are the Cooperation Relationships between Swedish Associations and Local Cooperating Organisations?

Both Sida and SHIA emphasise the importance of a good cooperation relationship between the Swedish organisation and the local cooperating organisation. The word “partnership” is usually used to describe the relationship.

The British research organisation INTRAC has conducted a number of studies of partnership between organisations in North and South. One example is a multi-year study of partnership in its NGO Research Programme.

INTRAC notes that partnership is a disputed concept that is regularly debated in assistance circles. INTRAC states that

Today's rule of thumb in international development is that everybody wants to be partner with everyone on everything, everywhere. Consequently, because of misuse and overuse, 'partnership in development' has become virtually meaningless and discredited. Too often the term is employed in ways which hide the unhealthy nature of many aid-related relationships.

INTRAC concludes that the designation “partnership” should only be used when the relationship attains a certain quality.

To prevent getting bogged down in the definition of partnership, we use the term “cooperation relationship” instead. The relationship can be good or poor, and somewhere in between. Behind both Sida's and SHIA's high prioritisation of the relationship lies the hypothesis that a good cooperation relationship results in good projects.

Based on Sida's, but particularly SHIA's own descriptions of the nature of a good cooperation relationship, we have produced ten different criteria for the cooperation relationship between a Swedish association and the local cooperating organisation.

We show our assessment of these criteria below. Our template for the assessments is shown in *Appendix 7. Template for assessing the cooperation relationship between Swedish associations and local cooperating organisations.*

Assessment criterion			
1. Both parties share a feeling of solidarity.	7 47%	2 13%	6 40%
2. Both parties are aware of and apply explicitly common fundamental values.	11 73%	3 20%	1 7%
3. Both parties have a long-term attitude to the cooperation relationship.	10 67%	2 13%	3 20%
4. Both parties have good understanding of each other's organisations.	8 53%	3 20%	4 27%
5. Activities are conducted in close and continuous dialogue.	6 40%	4 27%	5 33%
6. The relationship is characterised by mutual trust.	8 53%	5 33%	2 14%
7. The relationship between the parties is broad and diverse.	6 40%	5 33%	4 27%
8. Experiences are shared in all parts of the cooperation project, which is characterised by openness and a willingness to change.	10 67%	3 20%	2 13%
9. Clear division of roles.	2 13%	8 53%	5 34%
10. The local party is the clear owner of its core activities.	3 20%	1 7%	11 73%
Overall assessment of the cooperation relationship between Swedish associations and local cooperating organisations, based on the assessments above.	8 53%	3 20%	4 27%

7.1.1 Summary of conclusions and recommendations – How good is the cooperation relationship between Swedish associations and local cooperating organisations?

We assessed the relationship as weak in more than half of the 15 cooperation projects studied. We deem this to be unsatisfactory.

The only cooperation criterion that we assessed as strong in most cases is the local cooperating organisations' ownership of their core activities.

Direct reasons for weak relationships

The poor relationship can largely be attributed to the choice of the local cooperating organisation. When the cooperating organisation is a state organisation the relationship cannot be strong according to the criteria listed above. The same largely applies to support organisations that are not based on members. Finally, in one case our assessment was that there was no local cooperating organisation at all. These three categories comprise five of the eight relationships that we assessed as weak.

Choosing the right type of cooperating organisations is nevertheless often relatively easy to correct. Much more serious, and more difficult to remedy, are the reasons for less successful relationships in other cooperation projects. This includes the remaining cooperation projects that we assessed as weak and those we assessed as average. In these, the relationship is between organisations of people with the same disabilities. This is the particular type of relationships that SHIA and the associations give as the reason why an organisation is particularly appropriate for its work.

There are several reasons why relationships are poor. In the following section, we comment on each of the ten criteria individually:

1. *Both parties share a sense of solidarity.* In those cases where there is a lack of solidarity, this is mostly due to the local cooperating organisation being a state or similar organisation, rather than one supported and controlled by its members, or because there is no cooperating organisation, or that some other party than the association is the active Swedish party. Consequently, the problem is mainly related to the choice of cooperating organisation. In those cases where the local cooperating organisation is by and for people with disabilities, there is usually a strong sense of solidarity.
2. *Both parties are aware of and apply explicitly common fundamental values.* The lack of common fundamental values is clear. The most important reason is that values are often not discussed at all between the parties. It is not seen as an important issue. The second reason why we assessed the common fundamental values as weak in so many cases is that we have used SHIA's own criteria for the fundamental values. This includes equality and a democratic attitude. The problem is illustrated best by a quote from a representative of a Swedish association: "In many countries we do not share the same view of equality and democracy – it is that simple. Sometimes we try to influence, but we do not share views."
3. *Both parties have a long-term attitude to the cooperation relationship.* The most important reason for the lack of a long-term attitude to the relationship is that there is no distinction between project and relationship. The parties do not see the possibility of continuing a relationship after the current project has ended. This view stems largely from SHIA's office, which has not clearly communicated the difference between the project and the relationship. Cooperation partners in strong relationships assume the relationship will continue, regardless of whether they run joint projects or not.
4. *Both parties have good understanding of each other's organisations.* In a very large number of cases, we feel that the Swedish associations have less understanding and respect for the local cooperating organisations' structures than vice versa. Often, the local organisation showed a relatively good understanding and could explain the Swedish structure.
5. *Activities are conducted in close and continuous dialogue.* In accordance with the dialogue criterion for our assessment, it is mainly because the cooperation parties meet so seldom that the assessment grade is brought down. In many cooperation projects, the parties do not meet more than once a year.
6. *The relationship is characterised by mutual trust.* An important reason for lack of trust is the short-term nature of the relationship. If no party looks beyond the end of the current project phase, there can be no trust in the cooperation parties' long-term intentions for the relationship. Another reason is that they quite simply do not know each other sufficiently well to show that they deserve the trust of the cooperation party.
7. *The relationship between the parties is broad and diverse.* We have seen clearly that the relationship is more often broad and diverse when the Swedish party responsible is an organisation at local level. There is often a project group that is actively involved, and many members have their own relationships. When the cooperation project is managed at association's national level, it is often a single officer responsible for the relationship. This results in a one-man cooperation project that lacks breadth and diversity. In other cases, an external Swedish party, or SHIA, is responsible for the cooperation, and the Swedish association has very little contact with the local cooperating organisation.
8. *The sharing of experience is included in all aspects of cooperation, which are characterised by openness and a willingness to change.* Very often, the contacts between the cooperation parties are superficial and concern specific problems or general discussion about operational aspects. In few cases have the parties agreed on when and how to discuss experiences from the cooperation project in a structured way, learn from the experiences, and adapt the project accordingly.

9. *Clear division of roles.* The role division in the cooperation projects is often relatively clear, and we have not been able to identify any specific problems.
10. *The local party is the clear owner of its core activities.* In very many cases, the local cooperating organisation has clear ownership of its core activities. The Swedish associations do not get involved and take over.

A possible underlying cause of weak relationships

What then is the underlying cause of the weak cooperation relationships? Although it is difficult to say, there may be a result of a fundamental attitude of the Swedish associations. The basis of the cooperation with the local cooperating organisation is the project, not the relationship. This is particularly clear when an association is looking for a party to implement “its” project. In these cases, there is a complete lack of understanding of the concept of partnership. The Swedish party wants to help “those unfortunates,” and is not primarily interested in a closer relationship. Even if SHIA emphasises the importance of the relationship, or the partnership, we do not see much tangible work to strengthen relationships.

In those cases where we have assessed the relationship as strong, we have seen the opposite. There has been a deep personal relationship between individuals in both the organisations. They knew very well who the relationship was with, and the relationship was more important than the individual project. An interesting detail is that the strong relationships tend to be found where the real responsibility for the relationship lies at local level of the Swedish association.

We recommend that SHIA start thorough and comprehensive activity to improve the cooperation relationships with local cooperating organisations. The work should include the attitude to the relationships, the organisational structure in the project, and practical working methods for the cooperation project.

7.2 Do Good Cooperation Relationships Result in Relevant and Well-Implemented Projects?

A key principle for SHIA is that the cooperation between the Swedish associations and their local cooperating organisations is in the form of partnerships. There is a conviction that a good cooperation relationship, a partnership, leads to a better result.

One of the tasks in this evaluation was to assess whether SHIA’s working methods result in relevant projects. Or, more precisely, does a good cooperation relationship with the local cooperating organisation result in relevant projects being run?

When we were carrying out the evaluation, we added the assessment of the projects’ implementation. This meant that we could also assess the working methods in relation to how well the projects were implemented. This is perhaps an even more interesting comparison.

7.2.1 Do good cooperation relationships result in relevant projects?

On the subject of the link between, on the one hand, the success of the cooperation relationship and, on the other, the relevance of the project, SHIA’s implicit hypothesis that good cooperation relationships lead to relevant projects. Is this hypothesis correct? We tested for any link by comparing these two factors for all the 15 projects we visited.

	Project’s relevance assessed as “Weak”	Project’s relevance assessed as “Average”	Project’s relevance assessed as “Strong”
Cooperation relationship assessed as “Weak”	XX	XXX	XXX
Cooperation relationship assessed as “Average”	X	X	X
Cooperation relationship assessed as “Strong”		XX	XX

Conclusions – Does a good cooperation relationship result in relevant projects?

It is difficult to see any clear link between the cooperation relationship and the relevance of the project. Generally speaking, the 15 projects were evenly spread between the different combinations.

7.2.2 Do good cooperation relationships result in well-implemented projects?

In the same way as for relevant projects, SHIA's implicit hypothesis is that good cooperation relationships result in well-implemented projects. Is there any support for this hypothesis? Below, we test whether there is any link by comparing these two factors for all the 15 projects we visited.

	Project's implementation assessed as "Weak"	Project's implementation assessed as "Average"	Project's implementation assessed as "Strong"
Cooperation relationship assessed as "Weak"	XXXX XXX	X	
Cooperation relationship assessed as "Average"	X	X	X
Cooperation relationship assessed as "Strong"		X	XXX

Conclusions – Do good cooperation relationships result in relevant projects?

Compared with the link between relationship and the relevance of the projects, there is a clearer link between the cooperation relationship and how well the project has been implemented. We see the projects clustered in the two corners, and according to the hypothesis we expect to find:

- Strong (or medium strong) implementation of projects in strong cooperation relationships
- Weak implementation of projects in weak cooperation relationships.

This indicates that good cooperation relationships do result in well-implemented projects. Naturally, at the same time, there is nothing to indicate that it is the cooperation relationship in particular that affects the implementation. It may be the opposite, i.e. that well-implemented projects result in good cooperation relationships. Alternatively, they may simply interact, and therefore go hand-in-hand.

7.2.3 Summary of conclusions and recommendations

– Do good cooperation relationships result in relevant and well-implemented projects?

Because we see a link between good cooperation relationships and well-implemented projects, the projects could be better implemented if more effort was put into developing the cooperation relationships through planned relationship-building activities. So far, SHIA has not engaged in any tangible work to form relationships. It has more or less been taken for granted that, as long as the parties share the disability, there is a strong cooperation relationship. But working in a partnership is demanding, and a good cooperation relationship is not automatically created just because there is a joint project. There is a lot of scope for relationship-building activities, and SHIA should take responsibility for these.

We recommend that SHIA design and implement specific partnership activities with the aim of developing relationships between the associations and their local cooperating organisations.

8. Summary of Conclusions

8.1 Relevance and Implementation

SHIA's target group is people with disabilities that organise themselves in order to improve their chances of exerting their rights. There is both a focus on rights and a clear perspective of poor people as individual players in what SHIA wants to attain. This target group and focus completely agrees with the objectives of the NGO appropriation. So *SHIA's objective*, what it wants to achieve, is very relevant for funding from the NGO appropriation.

In line with SHIA's objective, associations usually cooperate with organisations of people with disabilities. Approximately two-thirds of the local cooperating organisations in our selection are very relevant organisations of this particular type. But even at this stage, in the choice of local cooperating organisation, things can sometimes go wrong. Schools, hospitals, expert organisations or projects without a local partner are neither the parties with which SHIA wishes to participate, nor do they fulfil the requirement of being a relevant local cooperating organisation. Nevertheless, they have been chosen as cooperating organisations in approximately a third of the cooperation projects.

Our assessment is that this is the main reason why SHIA's operational objective, to strengthen the opportunity for people with disabilities to form and develop their own organisations, is not well supported among all members. Choosing less relevant cooperating organisations cannot be regarded as "an accident at work" – there are too many cooperation projects of this type and they have often been going on for a long time.

The next step to help SHIA attain its objectives is to design specific projects. When we considered the projects' relevance in relation to SEKA/NGO's objectives and strategies, approximately half of the projects were assessed as very relevant. Many of the less relevant projects coincide with the less relevant cooperating organisations above, whose support also proved to be less relevant. But apart from these, the relevance in the projects of some relevant organisations was also assessed as low.

It is also important to note that if we instead had made the assessment based on SHIA's own objectives, restricting the analysis to the objective of strengthening organisations, the result would have been more negative. A number of projects that did not primarily focus on strengthening organisations would then have been assessed as less relevant.

Once again, too many projects have been going on for too long for this to be regarded as some sort of occupational hazard.

The last stage that we assessed regarding SHIA's route to attainment of its objectives is how well the projects have been *implemented*. Of our selection, we assessed that only a quarter of the projects were well implemented. If we remove the non-relevant organisations, where the implementation also often proved to be weak, just over a quarter of the selected projects in the category are still weak. These are the projects that are run in cooperation with relevant local cooperating organisations but which have been implemented in a less good or a poor way.

So we see a falling scale from relevant objectives to a selection of less relevant local cooperating organisations. The next stage is an even bigger proportion of less relevant projects, and finally a big proportion of poorly implemented projects.

This shows a big need for improvement. The objective is correct, but the implementation is wrong. Many of the recommendations in our report are aimed at improving these particular areas of weakness.

8.2 SHIA's Mandate

There is a discrepancy between what SHIA says, in different documents, is to be done and what is actually done. SHIA's rhetoric in reports, handbooks and policy papers is modern, well formulated and easy to be impressed by. The actual development cooperation that takes place does not match the philosophy and shows a large number of deficiencies, which we have described earlier. Nearly all the deficiencies we have seen are caused by deviations from SHIA's own documented focus and its own policy.

In our opinion, this is due to SHIA (its board and staff and its members, the associations) not having been a complete and development-oriented mandate. SHIA may not make demands, SHIA may not appraise, SHIA may not have opinions on the content of projects or the associations' working method, SHIA may not decide on priorities between projects, SHIA may not manage the operation. We consider all these to be necessary in order to develop the associations' development cooperation and ensure good quality. But SHIA has only been given an administrative mandate – to administer and distribute funding.

Because the associations have not given SHIA the necessary mandate, the office management has chosen to gradually try to make changes, which sometimes leads to conflicts with associations. SHIA's office is trying to gradually get the support of the member associations, and spread the philosophy that agrees with the organisations' objectives. In this way, it can carefully influence the design of the activities. However, the associations have not been specifically asked whether they are prepared to give SHIA the mandate that is required for the activities to attain their objectives and to meet Sida's requirements.

Why is the situation like this? SHIA is a democratic association that is owned by its members. If the associations want to engage in development cooperation using state funding, it is the members' responsibility to give their SHIA the mandate that is needed. One explanation is the associations' weak ownership of SHIA. The associations often do not see that they own SHIA. Instead, they perceive that SHIA is Sida's organisation and that Sida has given SHIA an assignment to carry out in relation to the associations. The associations and SHIA end up in a conflict relationship instead of cooperating towards a common objective. Another reason for the association's weak ownership is that development cooperation is a peripheral and controversial activity in many associations.

In our report, we give recommendations for making SHIA's mandate clearer.

9. The Impact of the Development Cooperation Projects on Communication Work

A separate and specific part of the evaluation involved assessing how the associations' development cooperation impacts SHIA's communication work. The task is not to evaluate SHIA's communication activities, but is restricted to examining the extent to which there are links between development cooperation and the communication work.

SHIA's communication work is relatively limited. In 2006, an information programme called "Increased awareness and popular involvement" was run, for which SHIA has received an information grant from Sida.

The strategy is to work in cooperation with associations in their own arenas as far as possible, for example in associations' own member newspapers, home pages or their own meetings. The aim is to

access an audience beyond those involved in and around associations, and to reach a general public interested in aid. The lobbying work is aimed at national and international authorities and support organisations.

The main tools for the communication work are:

- “ambassadors”
(trained members in the associations that disseminate information about SHIA’s work)
- the associations’ own communication work
- formal and informal meetings around thematic issues or projects
- home page
- the annual *Handling* publication
- media work
- meetings with public officials and decision-makers
- participation in HR networks

The associations’ information work

In order to investigate the extent to which associations feel that they contribute to SHIA’s communication work, we asked a separate question about this in the survey.

65% feel they contribute to SHIA’s information work by:

- conducting their own information work within the association about the development cooperation that the association engages in
- providing information about SHIA within the association
- participating in seminars that SHIA arranges, or arranging seminars together with SHIA

35% felt that they do not contribute to SHIA’s information work, and often commented that they lack awareness of it.

Regardless of whether or not associations receive an information grant from SHIA, the associations conduct, to varying degrees, their own internal information work about the development cooperation they are involved in. This work is directed towards their own members.

The information work comprises discussing the projects in annual meetings, writing about them in member publications, and arranging activities in conjunction with visits from the local cooperating organisations. In 2006 SHIA has distributed grants from its information appropriation to five associations for their own information work. For 2007 SHIA has made it formally possible for associations to apply for information grants, and the officers have informed the associations about this. Fifteen associations have applied.

Ambassadors

In 2006 SHIA has trained around 40 people to become information dissemination officers, “ambassadors”. Most of the ambassadors are members of associations. They are usually involved in the associations’ development cooperation, or interested in becoming involved, but this is not a requirement for participation. The ambassadors’ role is to spread awareness in their immediate circles about what SHIA is and does, and the methods used in the development cooperation. They provide information about their own association’s involvement in different projects, how people with disabilities are affected by development cooperation, global handicap policies and human rights.

Formal and informal meetings

In the last two years SHIA has arranged 11 meetings and seminars in cooperation with associations where the theme has been one or more associations' projects and experiences gained from these. These meetings are open to the public but are mainly directed at SHIA's members.

Home page, *Handling* and Disability.net

The home page includes brief information about each project in Africa and Asia, and about the regional and global projects. The information is taken from the applications. There is no information about the projects in Europe and Latin America. In other aspects, the home page primarily focuses on SHIA's lobbying issues.

The home page also includes the Web version of the annual review, *Handling*. Every edition of *Handling* concentrates on one theme. The articles focus on different individuals that are affected by the associations' projects, describe a few projects and relationships with Swedish associations, and the publication allows other players outside the cooperation projects the opportunity to write about the thematic issues. Approximately half of the articles in each edition are directly linked to project activities.

Disability.net is a global home page that is based on the participants on SHIA's ITP course about disabilities and human rights. The home page aims to create a meeting place for a global organisation for the disabled, and providing information about global issues. There is no direct link between this home page and SHIA's project activities, apart from participants being able to come from the local cooperating organisations.

Other information material

SHIA provides no printed information material about the development cooperation it is involved in, because this is seen as the associations' responsibility. However, one exception is the film "Piga Ngoma – Daniel's trip to Tanzania" which was produced in 2004 in collaboration with FUB. Another information campaign is the SDR/UNAD drama group tour in Sweden in the autumn of 2006.

Lobbying work

SHIA's lobbying work is directed towards two general issues: to see the situation for people with disabilities as a matter of human rights, where the work with the UN Convention on the Rights of People with Disabilities plays a big role, and to work for the inclusion of people with disabilities in the bilateral development cooperation.

The link between lobbying work and project activities is the idea that there must be organisations of people with disabilities in order for people with disabilities to be included in the bilateral development cooperation. Consequently, SHIA's development cooperation is needed in order to mainstream the handicap issue.

We have not considered in any detail the extent to which there is a more direct link between associations' projects and the lobbying work that SHIA carries out. This would require an evaluation of SHIA's lobbying work, which was not included in this study.

9.1 Conclusions – The Impact of the Development Cooperation Projects on Communication Work

Our assessment is that there are links between the project activities and SHIA's communications work. The clearest links are in associations that carry out their own information work, with or without an information grant from SHIA, in the ambassadors' work with disseminating information locally, in the information meetings that SHIA arranges, and in SHIA's publication *Handling*. To a very large extent, this work is directed towards members in associations and is aimed at getting the associations more involved in the international issues.

Our assessment is that SHIA is working deliberately to strengthen the link between its communications work and the associations' development cooperation. Both the ambassador system and the possibility for associations to apply for information grants are aimed at strengthening this link.

10. Proposals for Indicators of a Stronger Civil Society

Sida/SEKA's ambition is to be able to study in greater detail whether the frame organisation activities help to attain the NGO appropriation's objective of a stronger civil society. As part of this work, SEKA has formulated the four strategies that we have used to assess the relevance of both the local cooperating organisations and the projects. As we mentioned earlier, these strategies are not completely developed. As part of SEKA/NGO's method development, our assignment includes proposing indicators for the strategies, which the frame organisations could use when reporting results to Sida.

The following proposal is a basis for further discussion. It is written with the aim of functioning for all frame organisations, but we have designed the indicators based on what we have seen could be possible for SHIA. These strategies are formulated in such a way that we needed to rewrite them in order to use them in this evaluation.

Strategy 1

Fund parts of the organisations' lobbying activities in order to influence national and international players on different arenas to promote fairer global development.

Indicators:

- Stakeholder issue(s) on which the frame organisation's work is based have been introduced to the political agenda, such as inclusion in PRSP and national policies.
- The local cooperating organisation's level of visibility in the public debate.

Strategy 2

Help the organisations develop capacity to conduct lobbying activities. An important part of the organisations' capacity is that poor and marginalised groups can make their voices heard globally, regionally, nationally and locally through the channels that the organisation creates.

Indicators:

- The organisations in a given part of the civil society collaborate and share information and methods.
- There is a coordinating function for the part of the civil society supported, constructive dialogue held with the state, and the issue is monitored.
- There is an increasing number of members in the local cooperating organisations.

Strategy 3

Help the organisations develop capacity to conduct social activities and empowerment work to support the work of helping poor people change their life situation.

Indicators:

- Authorities and other organisations in the civil society take the activities of the local cooperating organisations seriously.
- The members regard the local cooperating organisations as legitimate.

Strategy 4

Fund parts of the organisations' social activities and empowerment work in order to improve the living conditions of poor people and marginalised groups.

Indicators:

- More state funding is allocated to the local cooperating organisations.
- State and municipalities have taken over activities from the local cooperating organisations.
- The members in the local cooperating organisations experience growing benefits from membership.

11. Compilation of Recommendations

In this section we present all the recommendations from the report. For each recommendation we refer to the section in the report where the recommendation is found.

We present the recommendations under four different headings, which correspond to the chapters in the report where they are found. We also indicate the priority for each recommendation. No recommendation has been given low priority because we have deliberately excluded any such recommendations. The two levels of priority are as follows:

- High priority. The recommendations that we feel will have a major positive effect if they are implemented
- Medium high priority. The recommendations that we feel will have good effect if they are implemented, but to a lesser extent than those with high priority.

11.1 Recommendations Regarding the Relevance of the Organisations

Recommendation	Section	Priority
1. We recommend that SHIA reformulate its objectives in the regulations in order to accentuate its objective to improve the living conditions of disabled people by helping disabled people form and develop their own organisations.	4.4	High
2. We recommend that SHIA define organisational development as its only strategy for attaining its operational objective.	4.4	High

Recommendation	Section	Priority
3. We recommend that SHIA's board initiate dialogue with the member associations and explain the purpose of the NGO appropriation and SHIA's objectives. If it becomes apparent that the majority of SHIA's members do not share these objectives, the issue must be raised at SHIA's annual general meeting. One alternative is that SHIA broadens its funding beyond the NGO appropriation and formulates new operational objectives.	4.4	High
4. We recommend that SHIA consistently apply its principle of cooperating with organisations of people with disabilities, and not to cooperate with state organisations or with expert organisations that are not member-based.	4.4	High

11.2 Recommendations Regarding the Roles of the Organisations and their Contribution to the Activities

Recommendation	Section	Priority
5. We recommend that associations give SHIA an explicit mandate to support and appraise in order to direct the associations' work towards SHIA's objectives.	5.1.3	High
6. We recommend that SHIA develop its activities for skills enhancement, quality appraisal, management and learning.	5.1.3	High
7. We recommend that SHIA train all officers in their officer roles, providing guidance and follow up so that the officers' work is more consistent and less arbitrary.	5.1.3	High
8. We recommend that the local cooperating organisations' plans of operation be used for planning and monitoring, and that the officers use these instead of the applications when the information is transferred to SHIA's administrative forms.	5.1.3	Medium
9. We recommend that SHIA's personnel never, either on their own initiative or on commission from associations, conduct continuous monitoring in relation to the cooperating organisations. All continuous monitoring should go through associations and SHIA's participation must be in the background.	5.1.3	Medium
10. We recommend that SHIA's responsibility for financial management be made clear for all parties.	5.1.3	Medium
11. We recommend that final reports be prepared after each completed project period in all cooperation projects. These reports are to be prepared by the association and the local cooperating organisation jointly. The focus should be on the results and what has been learned.	5.1.3	Medium
12. We recommend that the division of roles for initiating, planning and implementing evaluations be made clear.	5.1.3	Medium
13. We recommend that the Swedish associations clearly formulate their own role in their local cooperating organisations. This is to promote the share of experiences about how to form, run and develop an organisation for the disabled and its activities. This is to be more in the form of planned activities.	5.2.3	High

11.3 Recommendations Regarding the Relevance and Implementation of the Projects

Recommendation	Section	Priority
14. We recommend that SHIA place greater demands on all projects having a clear focus on capacity development.	6.3	High
15. We recommend that SHIA place greater demands on all projects having a clear focus on strengthening organisations of people with disabilities.	6.3	High
16. We recommend that SHIA develop criteria that assure the quality of the project's implementation, and to use these criteria when appraising project proposals.	6.3	High

11.4 Recommendations Regarding the Cooperation Relationship between Swedish Associations and Local Cooperating Organisations

Recommendation	Section	Priority
17. We recommend that SHIA start major efforts to improve the cooperation relationships with local cooperating organisations. The work should include attitudes to the relationships, the organisational structure of the project, and practical working methods for the cooperation project.	7.1.1	High
18. We recommend that SHIA design and implement specific partnership activities with the aim of developing relationships between associations and their local cooperating organisations.	7.2.3	Medium

Appendix 1. Terms of Reference

Terms of Reference for an Evaluation of SHIA'S Partnership Model and the Roles and Work of Partners

1 Background

A considerable part of Swedish development assistance is channelled through Non-Governmental Organisations (NGOs). Disbursements to NGOs for development cooperation during recent years have exceeded 1100 MSEK per year. At present the NGO Division at Sida contributes funds to Swedish organisations and their cooperation projects in some 100 countries.

In order to streamline the administration and assessment procedures for project proposals, Sida has introduced a system of frame agreements with thirteen large organisations. The agreements are based on procedures; principles and criteria laid down in Sida's Conditions and Guidelines for NGO support. As part of the frame agreement Sida allocates funds on a yearly basis to these large organisations which administer, assess, approve or reject project proposals from Swedish NGOs. Sida grants can cover up to 90% of the total project costs.

In recent years NGO cooperation has focused increasingly on the development or strengthening of civil society. NGOs are increasingly regarded as potential bearers of democratic values and norms, as well as arenas for democratic training/grounding. Since a considerable part of Swedish development support is channelled through NGOs it is of growing interest to ascertain the degree to which Swedish NGO development cooperation has contributed to the development of civil society.

In Policy for Global Development (PGD), the rights perspective and the perspective of the poor, permeate the policy and thereby programmes of development cooperation. The perspectives put the focus on the equal value of all people and make it clear that it is the needs, interests and conditions of poor people that are to govern development cooperation.

SEKA EO is in a process to develop methods regarding integration of the PGD perspectives in all NGO cooperation of the division. The aim is to develop a model for NGO cooperation in order to understand the impact on civil society.

The thirteen organisations with a frame agreement with Sida are either operative organisations or so called umbrella organisations. The operative frameorganisations are co-operating directly with partner organisations. The umbrella organisations are channelling support through Swedish organisations to the cooperation that they have with local partners. The SHIA is of the latter kind with no operative support to partners of their own.

SHIA and Sida have been working in cooperation together since SHIA's beginning in 1981 has been one of Sida's frame-organisations. From the financial year 1999 onwards Sida defined SHIA as an umbrella organisation, which does not primarily run operational work in the South and East but gives support to Swedish member organisations. A partnership agreement between Sida and SHIA was signed during 2001 and will apply up to (and including) 30 June 2007. During the financial year 2005, SHIA frame-agreement with Sida for development cooperation amounted to 39 719 000 Swedish crowns.

In the frame agreement of cooperation between Sida and SHIA it is stated that an evaluation of results/effects of the development cooperation programme or a system-audit evaluation, should be executed during the ongoing agreement period (2001–2006). During 2002 a capacity assessment of SHIA was executed.

An evaluation in general is a method of assessing the results of the past actions in order to incorporate the lessons in future planning. Evaluation is integral to development and, by holding a critical mirror to what has taken place, it can a) determine how far the various aims have been met, b) assess the relevance, effectiveness, impact and sustainability of what has been achieved, c) reconsider the validity of the assumptions behind original plan and d) indicate what insights can be offered to improve broader development policy and practice.

This evaluation is part of the general follow up of programmes supported by Swedish NGOs co-financed by Sida and is as such an important part of the dialogue between Sida and the NGOs. Any studies that recently have been undertaken in regard to SHIA should be used as background material as well as the principal steering document for Sida's cooperation with NGOs, e.g. "Sida's Guidelines for support to development programmes of Swedish NGOs", "Perspectives on Poverty" and "Sida's policy for Civil Society

2 Purpose and Scope of the Evaluation

The aim of the study is to analyse how SHIA, their member organisations and their local partners together work in order to develop a vibrant and democratic society where people work together in order to strengthen and enable poor people to improve their quality of life.

The evaluation is intended to increase Sida's knowledge about the added value of the relationship between Swedish NGO's and its local partners in development cooperation. The evaluation is also expected to assist SHIA to better understand their role and also possible internal development.

The main purpose of the evaluation is to assess the relevance of the SHIA programme. The evaluation shall assess the relevance of chosen methods and strategies in relation to the Theory of Change of each partnership. As such, the evaluation also aims to serve as an instrument in Sida's assessment of SHIA. It aims to assess to what extent the partnership model of SHIA give effects on the development projects and the goal achievement and to define if and how the partnership model give added value to the aim of the development cooperation.

The purpose is also to assess how the development cooperation of SHIA give an impact on and relates to the communication work of SHIA.

The evaluation shall provide Sida with a comprehensive review and analysis of Sida's development support through SHIA and its Swedish NGOs to strengthening the work of the local organisations.

The evaluation is expected to analyse and discuss 'partnership', which includes the concepts of 'relationships' and also the issue of 'common values' as a base for cooperation, within the assignment described below.

It is expected that the evaluation will serve as an instrument in the empowering process to strengthen the civil society. Hence, it will help to improve the processes and programming in future programme of cooperation as well as an input in the forthcoming work for the development of SHIA. It is further to make cooperation through Sida more relevant and efficient as well as to increase the knowledge about the relevance, possibilities and limits for Sida's cooperation with NGOs.

The evaluation shall provide Sida with a comprehensive review and analysis of Sida's development support through SHIA and projects/programs with its local partners, within the focus described in "The assignment" below. As such, the evaluation will serve as an instrument for Sida's assessment of SHIA.

The evaluation should cover the work of SHIA of today.

3 The Assignment

The following aspects will be analysed:

1. The perceptions of the roles of the partners in the chain. How do they perceive their own roles and the respective roles of the collaborating partners. Does it correspond to the real situation? What added value do SHIA and each partner bring to the cooperation?
2. The strategies, methods and goal analysis of SHIA and its Swedish partners in order to contribute to SEKA's overall objective. Contextual analysis, selection of partners, analysis of strength and weaknesses of partners, SHIA's partnership model and how it is perceived to contribute to goal achievement, may be examples of different methods. The perspectives of the poor and rights perspective, must be satisfied in development of strategies and methods.
3. The mandate and the areas of operations of the local partners and the degree of conformity. Analysis of the areas of operation in relation to the four strategies of SEKA (in the draft report to new guidelines for Sida's support to civil society organisation published in march 2006). Identification of possible indicators.
4. The relevance of the areas of operation of local partners in relation to the current problems in society and the relevance of the Sida funded programs in relation to the situation of the local organisation.
5. To define if and how the partnership model of SHIA give added value to the aim of the development cooperation.
6. To what extent there is a relation between the development work of

SHIA with partners in South and East, and the communication work in Sweden

Focus will be on the work of the local partners in relation to the overall objective. An analysis is expected to be done as a document study in Sweden according to a large amount of applications and assessment memos and descriptions of organisations, Interviews will be done with 8–10 local partners and their local branches.

In order to assess the relevance of the work in relation to current problem the context analysis of the partners, the poverty reduction strategy paper of the country and alternative papers are to be studied and persons well informed of the function and roles of civil society in the country and the situation for people with disabilities.

Overall, the evaluation shall have a poverty and handicap perspective in its analytical approach, where the main reference document should be Sida's "Perspectives on Poverty".

4 Methodology, Evaluation Team and Time Schedule

The evaluation has been commissioned by the Swedish International Development Cooperation Agency, the Division for cooperation with NGOs, (Sida/SEKA). Sida/SEKA is responsible for drawing up the terms of reference for the evaluation. A group consisting of representatives from both Sida and SHIA will be of access to the Consultant. The programme officer at Sida responsible for the evaluation in Stockholm is Carin Zetterlund Brune.

4.1 Method

The evaluation shall include the majority of the Swedish organisations receiving support from Sida through SHIA.

Locations and/or organisations shall be determined in dialogue with Sida and SHIA.

The Consultant shall evaluate necessary background documentation, (this documentation will be provided by SHIA or Sida) visit a sample of partner organisations and projects. The partner organisations and projects shall be selected in order to ensure a reliable and representative basis for the purpose of this evaluation.

The selected Consultant is asked to begin the assignment by preparing an inception report elaborating on the basic design and plan for the evaluation. After approval by Sida/SEKA the Consultant shall begin to carry out the evaluation as soon as possible.

During the evaluation process, the consultant shall give feedback on and discuss the initial observations/findings with the local partner organisations, i.e. included in the visits to the chosen countries.

During the evaluation process, the consultant will discuss observations/findings with SEKA EO through dialogue with the division.

Before a *draft report* is submitted to Sida the concerned NGOs incl. SHIA should be given the opportunity to comment and correct any factual errors.

4.2 The Consultant

The Consultant assigned to carry out the evaluation should have qualification, knowledge and experience appropriate to the purpose and scope of the evaluation, including:

- documented experience of international development cooperation (including competence regarding working for poverty reduction, gender equality, human rights and democracy) and,
- knowledge about civil society issues as well as the challenges civil society organisations are facing.

The Consultant should seek to have a gender balanced team and to use a participatory approach. The Consultant shall ensure that appropriate knowledge about local contexts forms a part of the evaluation, e.g. use of local consultants.

4.3 Time Schedule

The time needed for the assignment is estimated not to exceed 30 person weeks, including the time required to prepare the inception report and including time for completing the report.

5 Reporting and Timing

The evaluation shall be started no later than the 2006-03-01. An inception report shall be presented no later than 2006-04-01 and a *draft* of the full report shall be presented to Sida's NGO Division for consideration, not later than the 2006-10-15. Sida and SHIA will comment the draft report after which the Consultant shall prepare the *final report*.

The report must include a presentation of the process in drawing up the evaluation design and choosing methodology. It shall also list all contributors to the evaluation (excepting those that have opted for anonymity).

The final report is to be delivered by the Consultant to Sida's NGO Division within two weeks after received comments. The final report shall not exceed 50 pages excluding Annexes and be submitted electronically and in 15 (fifteen) hardcopies.

The report shall be authored in Swedish. The final report must be presented in a way that enables publication without further editing. The format and outline of the report shall therefore follow, as closely as is feasible, the guidelines in Sida Evaluation Report – a Standardised Format (see Annex 3). The report shall be typed on a word processor, using Word 6.0 as software. Later editions of this software may also be used (e.g. Word 7, Word for Windows 95 or 97). To facilitate editing and printing

the authors shall supply Sida with a disc, containing one file only. Subject to decision by Sida, the report might be published in the series *Sida Evaluation*.

The assignment also includes the production of a Newsletter summary, in a format adapted to the guidelines in Sida Evaluations Newsletter – Guidelines for Evaluation Managers and Consultants (Annex 4) and the completion of Sida Evaluations Data Work Sheet (Annex 5). The separate Newsletter summary and a completed Data Work Sheet shall be submitted to Sida/SEKA together with the final report.

6 Other

Sida's strategy for the internal development of capacities implies that Sida and SHIA personnel should have a possibility to participate in the ongoing work of the Consultant when appropriate.

7 Specification of Requirements

The tenderer shall possess the compulsory requirements below. The tenderer shall state how and when, according to the tenderer, the assignment is to be done;

- The tenderer shall state the working methods employed in order to complete the assignment and secure the quality of the completed work;
- The tenderer shall state the total cost of the Assignment, specified as fee per hour for each category of personnel, any reimbursable costs, any other costs and any discounts (all types of costs in SEK and exclusive of VAT);
- The tenderer shall submit a proposal for time and working schedules according to the Assignment;
- The tenderer should have a gender based team and use a participatory approach and;
- The tenderer should be able to sign the contract no later than the 2006-02-01.

Appendix 2. People Interviewed

Sweden

SHIA's office

Malin Ekman Aldén
Katarina Bergwall
Gunilla Hogling
Rebecka Bjurhall
Barry Hampshire
Sven Arnehed
Niclas Johansson
Fredrik Larsson
Anu Ala-Rantala
Ebba Öhlund

SHIA's board

Maria Linder Lundgren
Roland Håkansson

Member associations

*Swedish Association of Hard
of Hearing People (HRF)*

Hans Ericson
Kristina Ackzén

*Swedish National Association
of the Deaf (SDR)*

Kerstin Kjellberg
Lars-Åke Wikström
Yvonne Modig

*Swedish Association
of the Visually Impaired (SRF)*

Tiina Nummi-Södergren
Erik Staaf
Stellan Andersson
Ewa Nilsson
Elfon Björk
Cecilia Ekstrand
Vejbia Peksin
Arvid Lindén

(DHR)

Roland Håkansson
Karin Westlund
Gunder Wählberg
Jan Kaur

*Swedish National Association
for Persons with Intellectual
Disability (FUB)*

Lars Bolander
Birger Gustafsson
Kajsa Sundström
Solveig Erlandsson
Alvar Janse
Jonas Norrby
Åsa Lindkvist
Anna-Lena Jeppson

*National Association for Disabled
Children and Adolescents (RBU)
(FSDB)*

Hans Skyllberg
(FSDB)

Sven Sjöberg
Mona Britt Broberg

Sida

Carin Zetterlund Brune
Svante Sandberg
Toomast Mast
Marie Barck
Pontus Modéer

Bosnien Hercegovina

Udruzenje Slijepih Gradjana Kantona Sarajevo (USGKS)

Fikret Zuko
Amina Hadzic
Safeta Baković

U G Majke Hendikepirane Diece

Saida Arnautovic
Liljana Kasumovic
Almasa Franca
Nermina Omerovic
Marija Zulfić
Sabina Jahić
Sanja Selimović

Swedish Embassy

Joakim Molander

Kvinna till Kvinna (Woman to Woman)

Johanna Förberg
Ristin Thomasson

Helsinki Committee of Human Rights

Zivinca Abadevic

Reference Group Tuzla

Sanela Sehić

Lotos

Suad Zahirovic

Kenya

Mathare Special Training Centre

Phanice Musima

FSDB Kenya

Penny May
Joseph Maloba Shiroko

Parents Organisation (FSDB)

Esther Sande (Mama Albert)

Laos

National Rehabilitation Center (NRC)

Thongchanh Thepsomphou
Thonglith Sihabandith
Daravon Manivong
Mrs Viengkhone
Phorn Alayhack

Lao Disabled People's Association

Singkhan Takuonphak
Bounterm Chanhatalivong
Bouasone Bounphavanh
Ms Lattana

Mahosot Hospital

Hospital Manager
Doctor, Ear, Nose and Throat
Department

Swedish Embassy

Daovong Vongsay

Others

Bounlert Sayavong

Moldava

Asociatia Motivatie din Moldova

Nicolae Besliu
Igor Meriacre
Oxana Piscanscaria
Tatiana Rusu
Tatiana Bostan
Olga Bostan
Vera Fătu
Lilja Ciobanu

Humanitas

Aurelia Racu
Alona Savciuc
Veronica Paslari

External financial advisor

Irina Kovalenko-Skylberg

Parents

Ilona Sajina
Nina Ermolie-Dmitziera
Emelianova Ana Pakomovna
Ialina Vanaga
Olessa Mikoi
Jana Ermevo
Elena Zadorojniuc-Tutunaru
Maria Ivasiscina
Maria Mivico

Swedish Embassy

Igor Nedera
Nina Orlova

Municipal Department for Child Rights Protection, Chisinau City

Clara Grindberg

Consultant, Child Rights

Iosif Moldovanu

Tanzania

Tanzania League of the Blind

Mary Kalumuna
Zitta Batamanagawa
Felician Nkude
Ereniko S. Athanary
Paul Mathias

Tanzania Association of the Deaf

Dickson F. Mveyange
Nicholaus Mpingwa
Lupi Maswanya

Yombo Vocational Training Center

Dunford D. Makala

The Tanzania Association of the Physically Impaired (national)

Audax Barthazar
Blandina Semdu
Bo Svensson (Forum Syd)
Palemon Rujwahuka

The Tanzania Association of the Physically Impaired (Dar es Salaam)

Hamad Abdallah Komboza
Rebecca Eliazar

Uganda

Uganda Parents of Children with Learning Disabilities

Isidore Byamugisha
Edward S. Serumjogi
Kalule A. Kabuye
Lydia Lubega
Lovinicer Nalweyiso

Uganda National Association of the Deaf

Florence N. Mukasa
Alex Ndeesi
Olivia N. Bulega
David Muleme
Alice Amuge
Irene Ajok
Fatuma Nabagala
Julius Muthbazi
Ssenyondo Nasser
Hellen Kukumdakwe
Kahard Desmond

Vietnam

Hanoi Association of the Deaf

Tran Ngoc Tuan
Nguyen Trong Khanh
Board members and members

Vietnam Blind Association

Dao Soat
Cao Van Thanh
Nguyen Xuan Huong
Le Tiep
Truong Cong Dinh
Tran Van Nam
Board members, personnel and members in two provinces
Personnel and students at the VBA training centre

Others

Hoa Nguyen

Appendix 3. Definitions of Concepts

Vision, Objectives, Strategy and Working Method

The concepts of vision, objectives, strategy and working method are sometimes unclear and can be interpreted in different ways. To ensure a common definition of the concepts for this evaluation, we describe our definitions below.

Vision

A vision is a desirable future state. An organisation's vision is often vague and describes an ideal condition. It is often impossible to assess whether the vision has been achieved or, realistically, even to believe that it will be attained within the foreseeable future. Instead, the vision describes why an organisation exists, and what it is trying to achieve.

Objectives

Objectives are the intended effects of the organisation's activities. Objectives are a tangible description of what the organisation expects to achieve through its activities. In contrast to the vision, the objectives must be attainable, and it must be possible to assess whether they have been attained. Consequently, the objectives must be realistic and tangible. An organisation formulates objectives for different parts of its operation, for different time horizons, and at different levels of detail. The different types of objectives are often structured into a hierarchy of objectives, where fulfilment of detailed objectives that are to be attained in the short term lead to the attainment of overall objectives in the future. LFA is an example of how objectives are arranged into hierarchies.

Strategy

The strategy shows how the organisation's objectives are to be attained, so objectives and strategies are closely linked. The organisation's strategies describe the most important methods for attaining the objectives without going into detail.

As with objectives, strategies can be given for different levels of objectives.

Working method

The working method shows the practical work in accordance with the organisation's strategies.

The working method concerns activities. The strategy is about what is to be done, and the working method explains how it will be done.

The working method can also be defined at different levels of detail, corresponding to the different levels of the strategies.

Distinguishing between the concepts

It is often difficult to distinguish between the vision and the overall objectives. The difference between strategies and objectives is also often difficult to distinguish. Finally, the boundaries between strategies and working methods are not always so straightforward either. Fortunately these boundaries are not crucial. The important thing is that each organisation is consistent in the way it handles the concepts.

Below, we show an example of how logically related objectives can be arranged into different levels, and how logically related strategies and working methods can be defined in relation to the objectives:

1 Vision	Our vision is a society where the equal value and rights of all people are respected.		
2 Overall objective	Our overall objective in the work to attain our vision is to improve the living conditions of disabled people and to enable people with disabilities to form and develop their own organisations.	One of our strategies for attaining our overall objective is to strengthen the handicap organisations through capacity development.	One working method in the strategy is to support the development projects of cooperating organisations by following a number of defined steps in a project cycle.
3 Project objective	In this project we will work towards our overall objective through the project objective of building up the disablement organisation xx so that it becomes nationwide.	One of our strategies in the project is to strengthen the board.	One working method that we will use in the project strategy is training to help build up capacity.

Relevance

Relevance means that something is of interest in the applicable context. The relevance can vary depending on the benchmark used. In “Sida at Work” (2005) relevance is defined as:

The appropriateness of a development strategy, or a specific programme/project, in relation to cooperation partners and the priorities and needs of poor people, and in relation to poverty reduction as the objective of Swedish development cooperation.

This evaluation is based on the objectives of the NGO appropriation, so we have assessed relevance in relation to this. In 2005 SEKA, in cooperation with the frame organisations, developed four strategies whose purpose was to make the objectives of the NGO appropriation more tangible. The strategies are based on different development roles that the civil society can play. The strategies are broad and vague, and will require further interpretation. However, we have used them to assess the relevance of the local cooperating organisations and the relevance of the Sida-funded projects.

By a relevant cooperating organisation we refer to an organisation with:

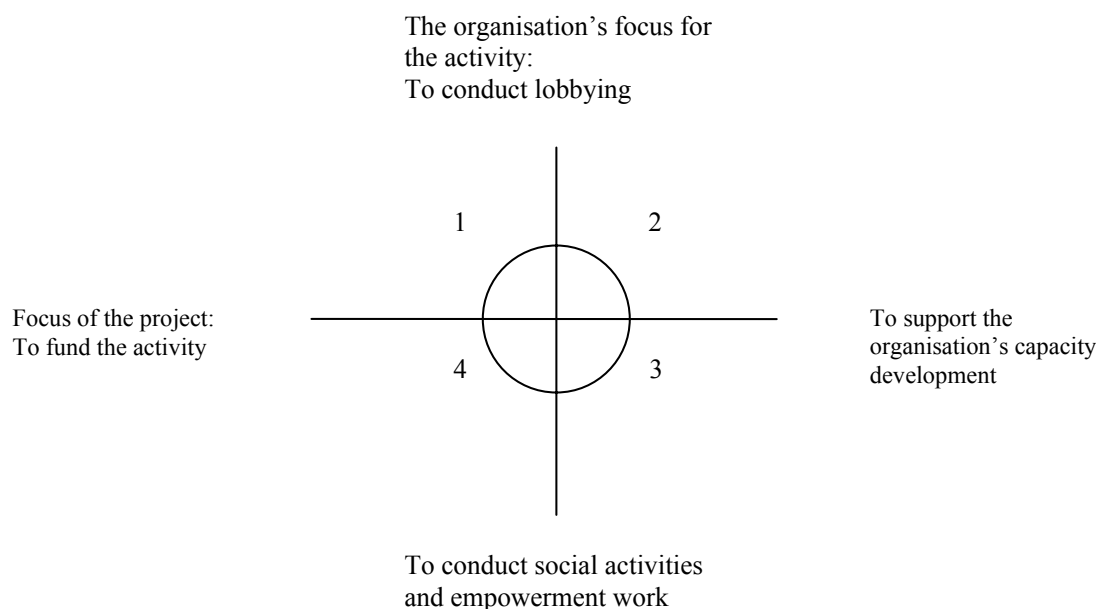
1. An objective of working in relation to the problems and needs of people with disabilities, and applying a working method that ensures that a close relationship with those parties involved in its activities;
2. A core operation that corresponds to the needs of the target group/members;
3. Core activities in one of the areas defined by the four strategies of the NGO appropriation.

Therefore, an organisation can be assessed as relevant irrespective of its capacity. SHIA and its member associations have designed a project in collaboration with the local cooperating organisation with the aim of developing and strengthening the local organisation. By a relevant project, we mean that:

1. The project agrees with the organisation’s overall objective and strategies, as well as the organisation’s internal development needs;
2. The project falls within one of the four strategies for the NGO appropriation.

Putting SEKA's Strategies into Operation

SEKA's strategies are not fully developed, and must still be regarded as hypotheses. The following model for analysis is seen as a manifestation of SEKA's way of thinking regarding the interpretation of the strategies.



The figures indicate the strategies. In SEKA's opinion there should be a balance between all four strategies in the financial support for each organisation, i.e. support within the circle is the ambition. Strategies 1 and 4 are focused on funding the organisation's activities. Strategies 2 and 3 are aimed at developing the organisation's capacity to run the activity and develop the organisation. SEKA feels that support that unilaterally ends up in one of the four fields has limited relevance (unless it can be explained by the organisation already receiving support in other strategies from elsewhere and not requiring Sida funding for it).

This is based on SEKA's argument that you must be able to support the objective to help poor people change their life situation all the way to the people in question. In principle, it is irrelevant whether an organisation improves unless the position of the poor people is improved through the activities of the organisation. Therefore, the organisation's activities often need support, and strengthening of an organisation is only of interest if this is related to the organisation's activities. Operational development should be part of strengthening an organisation's capacity.

The four strategies should therefore be applied to one and the same organisation.

SEKA's view of what is desirable is as follows:

- A project that is balanced in all four fields is best.
- A project in fields 2 and 3 is acceptable, both individually and together.
- Projects that only fall in fields 1 or 4 are not desirable, unless they are part of wider support.
- It is not a problem if projects contain fields 1 and 4, as long as fields 2 or 3 are also included.

Reformulation of SEKA's strategies

Based on our understanding of SEKA's interpretation of the four fields, we propose that the strategies are reformulated as follows:

Strategy 1 – original form:

Strengthen organisations *in their activities* to influence national and international players in different arenas in order to promote fairer global development.

Reformulated:

Fund parts of the organisation's activities for lobbying in order to influence national and international players in different arenas to promote fairer global development.

Strategy 2 – original:

Strengthen organisations that work to create channels through which poor and marginalised groups can make their voice heard globally, regionally, nationally, and locally.

Reformulated:

Support the development of the organisation's capacity for conducting lobbying. An important part of the organisation's capacity is that poor and marginalised groups can make their voice heard globally, regionally, internationally, nationally and locally through the channels that the organisation creates.

Strategy 4 – original:

Strengthen *the activities* of organisations that work to improve the living conditions of the poor and marginalised groups, and that promote the organisation's learning.

Reformulated:

Fund parts of the organisation's social activities and empowerment work in order to improve the living conditions of the poor and marginalised groups.

Strategy 3 – original:

Strengthen organisations that work to improve the capacity of poor people to change their life situation.

Reformulated:

Support the development of the organisation's capacity to conduct social activities and empowerment work in order to improve the capacity of poor people to change their life situation.

Appendix 4. Projects Studied

We have studied the following projects through document studies. We have also studied the project shown in bold through in-depth interviews with the Swedish member associations and visits to local partners.

Country	Budget 05–06	Member association	Cooperation partner	Focus	Local partner	Length of cooperation	Swedish partner
Kenya	0,3	• FUB	• Mathare Special Training Centre	Individual	Support organisation	Long	National
Tanzania	0,4	• SRF	• TLB (Tanzania League of the Blind)	Organisation	Nat. disablement org.	Long	National
Tanzania	0,3	• RTP	• CHAWATA (Migara) (The Tanzania Association of the Physically Impaired)	Individual	Local disablement org.	Short	Local
Tanzania	0,3	• SDR • HRF	• CHAVITA (Tanzania Association of the Deaf)	Individual	Nat. disablement org.	Short	National
Tanzania	?	• DHR	• CHAWATA (national) (The Tanzania Association of the Physically Impaired)	Organisation	Nat. disablement org.	Short	National
Tanzania	?	• DHR	• CHAWATA (local) (The Tanzania Association of the Physically Impaired)	Organisation	Local disablement org.	Short	Local
Uganda	0,4	• FUB	• UPACLED (Uganda Parents of Children with Learning Disabilities)	Individual	Nat. disablement org.	Short	Local
Uganda	1,3	• SDR	• UNAD (Uganda National Association of the Deaf)	Individual	Nat. disablement org.	Short	National
South Africa	0,9	• FSDB	• DbSA (Deafblind South Africa)	Organisation and individual	Nat. disablement org.	Short	National
Nepal	0,5	• FBIS	• NHS (Nepal Hemophilia Society)	Organisation and individual	Nat. disablement org.	Short	National
Nepal	1,0	• NHR	• NDA (Nepal Disabled Association)	Individual	Nat. disablement org.	Long	National
Thailand	0,4	• SDR	• NADT (The National Association of the Deaf in Thailand)	Organisation	Nat. disablement org.	Long	National
Laos	0,3	• SDR • HRF	• LDPA (Lao Disabled People's Association)	Individual	Nat. disablement org.	Short	National, regional
Laos	0,3	• SDR • HRF	• NRC (National Rehabilitation Centre)	Individual	Support organisation	Short	National, regional
Laos	0,8	• HRF	• Mahosot-sjukhuset	Individual	Support organisation	Short	National
Sri Lanka	0,6	• SDR	• CFD (Central Federation of the Deaf)	Organisation	Nat. disablement org.	Short	National, regional, local

Country	Budget 05-06	Member association	Cooperation partner	Focus	Local partner	Length of cooperation	Swedish partner
Sri Lanka	0,2	• SRF	• SLNFVH (Sri Lanka National Federation of the Visually Handicapped)	Organisation and individual	Nat. disablement org.	Short	National
Vietnam	0,2	• SDR	• Hanoi Association of the Deaf	Organisation	Support organisation, local disablement org.	Short	National
Vietnam	0,6	• SRF	• VBA (Vietnam Blind Association)	Organisation and individual	Nat. disablement org.	Long	Regional
Nicaragua	0,5	• RSMH	• ASMEN (Asociación de Usuarios de Salud Mental)	Organisation	Local disablement org.	Long	National
Bolivia	1,1	• RSMH	• CERECO (Centro de Rehabilitación Cochabamba)	Individual	Support organisation	Short	Local
Brazil	1,1	• RFA	• AMA (Associação de Amigos do Autista)	Organisation and individual	Local disablement org.	Short	National
Bosnia	0,7	• SRF	• USGKS (Udruzenje Slijepih Gradjana Kantona Sarajevo)	Organisation and individual	Local disablement org.	Short	Regional
Bosnia	0,2	• FUB	• U.G. Majke Hendikipirane Djece	Organisation and individual	Local disablement org.	Short	Local
Russia	0,6	• Swedish Diabetes Assoc.	• Karelian Diabetic Society	Organisation	Local disablement org.	Short	Regional
Moldavia	0,6	• RBU • FUB	• Motivation Moldova Association • HUMANITAS (Association of Mentally Disabled Children of Moldova)	Primarily individual but also organisation	Support organisations	Short	National
Regional	3,5	• FSDB	• Ministry of Education, Kenya	Organisation och individual	Support organisation	Long	National
Regional	2,5	• FSDB	• FLASC (Federación Latinoamericana de Sordociegos)	Organisation	Regional disablement org.	Long	National
Global	0,6	• FSDB	• WFDB (The World Federation of the Deafblind)	Organisation	Int'l disablement org.	Short	National

Appendix 5. Assessment Template for the Relevance of Local Cooperating Organisations

Criteria	Weak	Medium	Strong
Agreement with objectives To what extent does the organisation's overall objective agree with the SEKA/NGO objective?	No overall objectives.	Has identified people with disabilities and/or their families as a target group, and overall objective is about working with their central problems.	The organisation has formulated an idea about its role in the development of society. AND The organisation's objective is to strengthen people with disabilities and/or their families to improve their life conditions.
Legitimacy Is the work of the organisation based on the needs and problems of people with disabilities?	No explicit focus on people with disabilities. No analysis of the target group's needs.	Has an explicit focus on people with disabilities but the needs analysis is weak.	Has no explicit focus on people with disabilities. Can present the target group's needs.
Legitimacy Does the organisation have a structure that creates a relationship with the people it represents that creates transparency and allows them influence over the activities?	No, it is not a member organisation.	Yes, it is a member organisation but the members do not seem to be given the opportunity of insight and influence.	It is a member organisation and has an elected board that includes the target group. Annual general meeting and possibly other member meetings are held where the members are given the opportunity to influence the operation.
Core activity To what extent does the core activity of the organisation fall within SEKA/NGO's Strategy 1: Conduct national or international lobbying?	A marginal part of the organisation's operation.	Comprises approximately half of the organisation's activities.	Comprises most of the organisation's activities.
Core activities To what extent does the core activity of the organisation fall within SEKA/NGO's Strategy 4: Conduct social activities and/or empowerment work for people with disabilities	A marginal part of the organisation's operation.	Comprises approximately half of the organisation's activities.	Comprises most of the organisation's activities.
Overall assessment of the local cooperating organisation's relevance based on the criteria above (the two assessments for the core activity are added together, e.g. weak + weak = medium, and medium + medium = strong).			

Appendix 6. Assessment Template for the Relevance of Projects

Criteria	Weak	Medium	Strong
Agreement with objectives	There is no overall objective.	The project corresponds to a certain extent with the organisation's overall objective.	The project is completely within the organisation's overall objective.
Does the project's focus agree with the local cooperating organisation's overall objective and strategy?	OR The project falls completely outside the organisation's overall objective.		
SEKA/NGO's strategies	The project falls only in strategy 1 and/or 4. There is no support from other donors that focus on other strategies.	The project falls only in strategy 1 and/or 4, but it is part of a bigger programme where other donors fund other parts that include several of the other strategies.	The project falls within all four strategies.
To what extent is the support designed in accordance with the priorities for the NGO appropriation?		OR The project falls in strategy 1 and 2 or in strategy 3 and 4.	OR The project falls in both strategies 2 and 3, and one of strategies 1 or 4.
Strategy 1	The organisation has not designed any specific questions for its lobbying work. There is no clear needs analysis. The activities are of an ad hoc nature.	The organisation has defined specific questions for its lobbying work, and there is a clear needs analysis. The activities are of an ad hoc nature.	The organisation has defined specific questions for its lobbying work, and there is a clear needs analysis. The activities are carried out using clearly defined methods.
Strategy 2	Does the local cooperating organisation conduct strategic and structured lobbying using Sida support?		
Does the Sida-supported project develop the local cooperating organisation's capacity for lobbying?	There are no elements of operational development of lobbying work in the project.	There are significant elements of operational development of lobbying work in the project.	The project largely consists of operational development of lobbying work. AND The project creates channels for the target group to make its voice heard.
Strategy 4	Poor people with disabilities do not benefit from the support.	The support gives poor people with disabilities skills and opportunities to change their lives, but the organisation has no clear idea about its own role in relation to the state's responsibility.	The support gives poor people with disabilities opportunities to change their lives. AND The organisation has a clear view of its role in relation to the state's responsibility, both now and in the future.
Strategy 3	The support is only operational, with no elements of developing the organisation and its capacity.	The project contains significant elements of organisational development.	The project largely consists of organisational development.
Does the Sida-supported project develop the local cooperating organisation's capacity to conduct social activity and empowerment work?			
Overall assessment of the project's relevance based on the above assessments.	A project classified as "weak" in strategy 4 is always assessed as "weak", regardless of the assessments in other strategies.		

Appendix 7. Template for Appraisal of the Cooperation Relationship between Swedish Associations and Local Cooperating Organisations

Criteria	Weak	Medium	Strong
1. Both parties share a feeling of solidarity.	The parties do not have the same disability, or have the same disability but do not discuss their experiences of this. The parties have no respect for differences in culture, background and financial capacity.	The parties have the same disability and experiences from this are discussed sometimes. The parties show a certain respect for differences in culture, background and financial capacity.	The parties have the same disability and often discuss experiences of this. By doing so, they have developed a strong common identity. The parties show respect for differences in culture, background and financial capacity.
2. Both parties are aware of and apply explicitly common fundamental values. (SHIA has defined equality, full participation, human rights, democratic basic view)	Values are not discussed, and the fundamental values are taken for granted.	Common fundamental values are given as a reason for the cooperation, and values are sometimes discussed. However, the parties cannot precisely define the fundamental values.	The parties have regular discussions about the fundamental values and their applications. The parties can clearly define the common fundamental values.
3. Both parties have a long-term attitude to the cooperation relationship.	The parties have been brought together for this particular project, and have no thoughts about the future after the project.	The parties have had a previous relationship, before this project.	The parties have identified development problems together, and have decided to try to change society together, even after the current project is ended.
4. Both parties have a good understanding of each other's organisation.	The parties have poor insight into each other's objectives and organisational structure, where the Swedish structure involves both association and SHIA.	The parties have a certain understanding for each other's structures, but do not always respect structures and processes.	The parties have a good insight into, and can explain and respect, each other's objectives, structures and processes.
5. Activities are conducted in close and continuous dialogue.	Sporadic, infrequent contacts between meetings (once a year, often only in conjunction with reporting, etc.). The parties normally meet less often than once a year.	Contact is made between meetings when a need is felt. The parties normally meet once a year.	Regular contact between meetings. The parties normally meet more than once a year.
6. The relationship is characterised by mutual trust.	At least one party feels that the other party does not trust its intentions and capacity. OR At least one party does not have confidence in the other party's intentions and capacity. At least one party shows a lack of openness towards the other.	Each party feels that the other party has some trust in its intentions and capacity. AND Each party feels some trust in the other party's intentions and capacity. Each party shows some openness towards the other.	Each party feels that that other party has a great deal of trust in its intentions and capacity. and Both parties feel a great deal of trust in the other party's intentions and capacity. Each party shows a great deal of openness towards the other.

Criteria	Weak	Medium	Strong
7. The relationship between the parties is broad and diverse.	Only one person has a relationship to the other party in at least one of the organisations. Hardly any of the members in either organisation has any knowledge of the cooperation.	Two to three people in the two organisations have a relationship to the other party. A limited number of members in both parties are slightly aware of the cooperation.	More than four people in both the organisations have a relationship to the other party. There is a broad commitment and interest in the cooperation in the organisation of both parties.
8. Experiences are shared regarding all aspects of the cooperation relationship, which is characterised by openness and a willingness to change.	The cooperation mostly concerns discussions regarding the progress of planned activities. The parties do not discuss the lessons learned. No understanding of the need to learn from one another and to change.	Experiences are sometimes discussed at meetings. The parties sometimes discuss lessons learned, which can provide input to the development of the cooperation project. Some understanding of the need to learn from one another and to change.	The parties have agreed about when and where to discuss experiences from the cooperation in a structured way. The parties learn from the experiences, and adapt the project to these experiences. The parties view learning and change, based on experiences, as something positive and obvious.
9. Clear division of roles	No clear division of roles. One party feels that it lacks a clear role in the common activities.	The parties are somewhat in agreement about the division of roles, including SHIA's role, but this has not been formalised. Both parties have some understanding of their roles in the joint operation.	Role division is clearly defined and is formalised in agreements or similar. Both parties have a clear understanding of their roles in the joint activities and about what the other party contributes.
10. The local party is the clear owner of its core activities.	The Swedish party describes as its own the local party's core activity The Swedish party makes important decisions concerning the local party's core activity.	Both parties describe the local party's core activity as a joint activity. Important decisions relating to the local party's core activity are made jointly.	The local party runs its core activity independently at different levels in its organisation and throughout the project cycle. The Swedish party feels great responsibility for the activities and supports the local party in taking this responsibility.

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