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Sida REVIEW

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Abbreviations

ASEAN	The Association of Southeast Asian Nations
AsiaDHRRA	Asian Partnership for the Development of Human Resources in Rural Asia
BB	Building Bridges
CAD	Canadian Dollar
CEO	Chief Executive Officer
CS	Civil Society
ECDPM	European Centre for Development Policy Management
FIM	Forum International de Montréal
FY	Financial Year
G8	'Group of Eight'
GO2, GO5	Global Governance 2002, Global Governance 2005 (FIM conferences)
IDRC	International Development Research Centre
IGO	Inter-governmental organisation
M&E	Monitoring and evaluation
MENA	Middle East and Northern Africa region
NCG	Nordic Consulting Group
NGO	Non-governmental Organisation
OIC	Organisation of the Islamic Conference
SEK	Swedish Krona
Sida	Swedish International Development Cooperation Agency
TOR	Terms of Reference
YP	Young Professional

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A few other external stakeholders also provided useful feedback, and the team would like to thank all those who contributed. Please see Annex IV for List of People interviewed/consulted.

Executive Summary

Below is a summary of key findings and recommendations. The relevant table is also included at the end of each section for easy reference.

a) Financial management

Key findings	Recommendations
Overall finding: An <i>overall finding</i>, closely linked to the issues related to financial management, is that the financial deficit in O6, together with the evaluation recommendations (J. Christie, O6) led to an organisational restructuring of FIM that went far beyond the recommendations outlined in the evaluation report. Strengthened financial management, the need for tighter financial controls, and sustained funding stood at the centre of this restructuring.	Although improved and strengthened systems are now in place, the next programming period should be considered as the actual consolidation phase. As such, <i>transitional issues need to be identified and closely monitored</i>, including the new systems for <i>financial and organisational management</i>.
Financial sustainability: The <i>long-term financial insecurity</i> of FIM is still an issue that has not been adequately addressed, though ideas and suggestions have been discussed internally and with the Board. Budgets and funding still tends to be event- (e.g. conference) or <i>output-specific</i> (e.g. a specific research paper or case). This does not address the funding gap in between events for ongoing dialogue, learning and reflection. Neither does it allow for salary costs to be shifted to specific project or event budgets. FIM is facing a <i>funding dilemma</i>: on the one hand needing to shift more operational costs (and salary costs) to project funding, and on the other, trying to focus and downscale on projectised funding in order to consolidate the gains in its core areas of operations over the next period. During the next programming period of further consolidation of organisational practices and systems, <i>minimal but steady core (seed) funding is required</i> to give FIM the space and security to address some of these internal issues.	Ideas and plans for FIM's sustainability and the diversification of <i>funding sources for its running costs</i> should be formulated in a long-term <i>sustainability plan</i> with options and 'coping strategies' to deal with funding fluctuations. This is particularly relevant since Sida is potentially the only multi-year donor providing institutional support to FIM as of 2009.¹ A <i>clearer institutional results framework</i>, and clearer language and explanations of core competencies and niche placement may help to attract institutional and targeted funding for FIM's activities and operations (see section on results-based management and monitoring). Try to obtain funding for the <i>learning, documentation and communication</i> work of FIM to develop that side further, and to help bridge funding gaps in between more targeted events².
Financial management system: Relations between the Universalia financial management team (day-to-day bookkeeping), the Office and Programme Administrator, the CEO and Executive Committee and the Board in relation to financial management have been institutionalized, and enable appropriate financial management of the organisation.	Close attention to how the new system of <i>financial management works in practice</i> will be important over the next period. Additional human resources capacity in the area of financial management may be necessary if FIM receives any larger grants for e.g. the Building Bridges project³.

¹ A sustainability plan was discussed already in the Sida Assessment Memo of 2006, but due to the organisational restructuring FIM was unable to focus on these issues until a the restructuring was completed and the debt reduction plan was in place.

² Smaller grants in this area have been obtained from IDRC to develop the website, Ford Foundation and others in the past, but on a small-scale and ad hoc basis. With the new Research and Programme Coordinator in place, FIM stands a good chance of attracting longer-term funding in this field.

³ FIM has submitted applications to attract funding to the Building Bridges project to a number of sources, including the European Union. However, the outcomes of these applications were still unknown at the time of the assessment.

b) Results-based management

Key findings	Recommendations
Strategic plan and results-framework: Apart from the yearly FIM Forum and Board minutes, FIM does not have an <i>overall strategic plan and results-framework</i> to reflect how activities contribute over time towards long-term results. On the one hand, one can argue that this makes a small organisation like FIM <i>more flexible</i> and able to act and react as needed to upcoming needs and events. On the other hand, a well-constructed strategic plan should set the framework and be a <i>living and adaptable tool</i>, with the right RBM instruments attached to it. It should <i>reduce, rather than increase the administrative burden</i> over time. <i>Intermediate level results</i> (between the mission and specific outputs and milestones) are not well captured, measured/assessed or tracked over time. Work on developing organisational and project specific indicators have been delayed due to the restructuring, but it would be <i>timely to prioritise</i> this at the beginning of the next funding phase.	As part of any new/renewed agreement about institutional funding as of 2009, FIM should make sure to earmark funds to develop an <i>organisational strategic plan</i> and results-framework with <i>key indicators</i> at organisational and project levels (around 5–10 organisational level indicators used in the reporting to track progress on strategic objectives and relevance of niche placement). Make sure that <i>intermediate results</i> are captured and tracked over time, with an analysis of results included as part of the regular reporting (not just a list of outputs). Agree with funders on a streamlined <i>reporting framework</i> that reflects and connects specific stand-alone activities and events to the overarching strategy and intermediate results (i.e. beyond outputs). Consider using a <i>learning and actors-oriented approach</i> that focuses on tracking influence and effect of FIM activities on certain groups/ actors/ stakeholders over time (such as e.g. Outcome Mapping, mixed with other tools and instruments as needed).
Funding for results-based management and documentation of lessons: Currently there is no <i>financial allocation</i> set aside in FIM's yearly budget (FY 08/09) for developing a strategic plan and results framework with a number of key indicators to be tracked over time.	Any funder wanting to support FIM institutionally should ensure that <i>money and time</i> is set aside and <i>earmarked specifically</i> for strategy development and ongoing monitoring and follow-up on key indicators and results. FIM also needs to make the <i>budgetary allocations</i> for this as part of their core activities.

c) Organisational governance and management

Key findings	Recommendations
Board composition rotation and roles: The FIM Secretariat considers the Board Members as the <i>main strength</i> of FIM, given that they are prominent civil society leaders from around the globe, or renowned academics in the field of global governance. The FIM <i>Board Chair is stepping down in 2009</i> after 10 years as Chairman, and a rotation system is being introduced with new members elected onto the Board. With an increasing rotation of Board Members, and more new Board Members coming in, there is a risk that FIM loses its focus or is pulled off track, unless these new members fully understand and support FIM's unique niche in its field of operations.	<i>Terms of Reference for the FIM Board</i>, detailing its role, division of labour between the Board and the FIM Secretariat, its decision-making and advisory functions etc., need to be clearly stipulated and made accessible on the website as part of the information about FIM. An annex to the TORs for the FIM Board should spell out <i>Board composition, rotation schedules, proposal and selection procedures</i> for new Board member candidates. The <i>role of the FIM Board</i> in relation to the Building Bridges project, which is governed by its own logic and Steering Committee, is somewhat unclear and needs to be spelled out. A special <i>orientation for new Board members</i> should be introduced. The role of former Board members in such an orientation scheme can be explored.

Key findings	Recommendations
Secretariat staff management issues: The reorganisation has drastically reduced operating costs, but has left the organisation with the ‘bare minimum’ in terms of human resources capacity and operating margins. The current CEO and Research and Programme Co-ordinator are paid only part-time work but work full-time, based on their own personal commitment to the cause of FIM. Although admirable, this is not sustainable for the organisation in the long run, and will make it difficult to attract the right candidate for a successor CEO.	While a lean organisation can be considered flexible and cost-effective – especially since it still manages to deliver on programme objectives with very small means – <i>expansion of at least core functions</i> (CEO and Research and Programme Coordinator) to full-time paid positions, as well as the recruitment of an additional <i>full-time junior communications officer</i> would be required (see justification in section 4).
CEO (and Board Chair) successors in 2009: The shift in management leadership (appointment of new CEO) and the shift in Board Chair constitute a <i>major organisational risk factor</i> over the next couple of years. On the other hand, <i>conscious (and cautious) steps</i> to avoid the “founder’s syndrome”⁴ should be seen as positive for the organisation’s long-term sustainability.	A <i>risk mitigation strategy</i> should be developed to address some of the issues relating to the transitional period (including the particular role of the former CEO in providing institutional support). By developing an <i>overarching strategic plan</i> and key result areas (referred to above), and by institutionalising those work processes that currently work well, the risk of being pulled ‘off track’ by new incoming people and interests will be considerably reduced. It will also serve as a <i>helpful guidance</i> to the incoming CEO.

d) Niche and positioning

Key findings	Recommendations
FIM mission and vision: FIM’s mission statement was revised reflecting the 2006 evaluation recommendations. A vision statement was also approved by the Board in 2008. However, the text still allows for some potential <i>confusion</i> as to the specific role and contribution of FIM, and the language should be <i>more specific and concrete</i>.	Some further work would be recommended to <i>align the vision and mission logically</i>, and to be more <i>specific</i> about FIM’s particular role and contribution (see suggestions in section 4.1). In elaborating a strategic plan, with a clear definition of its niche and added-value, it will be important for FIM to <i>consider and weigh all its different functions</i>, and consider where current and future strengths are. Less formalised and visible aspects of FIM’s work should be articulated and included, such as its discreet and behind-the-scene diplomacy (with examples from G8 work and Building Bridges), its mobilization potential of Southern civil society leaders in relation to different multilateral processes, and its ability to continue to attract ‘leading minds’ in the field of citizen-driven multilateralism.
As an NGO, FIM seems to be quite <i>unique in its niche</i>, including in the area of bridging civil society knowledge and academia. However, it needs to argue for and prove <i>why FIM is well placed</i> to take on this role, and what its limitations are.	In connection with the 2009 FIM Forum and Annual Board Meeting in New Delhi it is recommended that FIM spends an additional day or half-day with Board Members in a ‘<i>strategic retreat</i>’ to carry out a <i>moderated niche plotting exercise</i>, and to initiate the process of developing a strategic plan and a results-framework for the organisation.
External stakeholders with no direct institutional link or personal connection to FIM have <i>difficulties in clearly articulating or pin-pointing FIM’s niche or added value</i>. The fact that FIM is poorly understood by ‘outsiders’, possibly including potential donors, <i>may affect its ability attract funding</i> and diversify its funding sources.	The use of more <i>precise language</i> to describe FIM and what it does needs to be reflected in all information materials and communications about FIM, including on its role and added value. With an elaborated strategic plan, such communications can also be more <i>forward looking and strategic</i> in relation to different stakeholders’ (or donor) interests.

⁴ Refers to the phenomenon where an organisation remains entirely dependent on the founder(s), and where no institutional mechanisms are put in place to ensure the survival of the organisation beyond the involvement of the founder(s).

e) Selection of programmatic areas of engagement

Key findings	Recommendations
The <i>selection of thematic areas and focus topics of the FIM fora</i> is done by the Board. There are currently no guidelines or 'tools' to assist the Board in making this decision (e.g. user's survey, briefing paper, or even a results framework in line with an overall FIM strategic plan), apart from the general discussions at the yearly FIM forum.	<i>Guidelines</i> – or a checklist – is needed to ensure that any thematic area FIM chooses to focus on for a case or for targeted activities is in line with the core mandate and focus of FIM, which is to focus on the interface between civil society and multilateralism in order to: a) broker Southern civil society knowledge, b) to raise and document Southern civil society/citizen voice in relation to multilateral processes, or c) to find cases where clear and applicable lessons can be extracted for use in relation to multilateralism by civil society in the global South. <i>Other complementary tools to make topics strategic</i> (and 'fundable') should be considered, such as carrying out a user's survey among the wider FIM constituency on the types of issues and processes they need knowledge about. This would also make the selection process more inclusive.
<i>Follow up on emerging issues</i> at the FIM fora is still limited, and there is no dedicated funding for it. Staff time is still <i>too limited</i> to effectively follow-up on new and emerging issues and ideas.	FIM should <i>encourage maximum cohesion and complementarity</i> between topics treated at the FIM fora and FIM project areas where more thorough and longer-term follow-up is possible. New and <i>emerging issues</i> (or those generating particular interest among participants) should be picked up for moderated email/online discussion fora (e.g. through d-groups, www.dgroups.org) following events. A synthesis of post-forum e-discussions can be presented and discussed at the following year's FIM forum for continuity.
A <i>high degree of learning</i> has taken place in FIM in relation to the Building Bridges project since 2005. It is also an area where FIM has been able to use its core competencies of ' <i>behind-the-scene, discreet diplomacy</i> ' with success.	FIM's core competencies of <i>mobilizing civil society around sensitive issues</i> and using its influence and networks effectively to make in-roads into an area like the OIC could be in high demand in the future. <i>Informal diplomacy</i> in the field of the civil society-multilateral interface is increasingly in demand with formal multi-stakeholder processes becoming more and more stifled and rarely leading to frank and open dialogue between parties. This is an area that FIM should capitalize on in its future work.

f) Communications with external stakeholders/constituency

Key findings	Recommendations
FIM's <i>strategic communication approach</i> is weak; it is unclear who FIM (and the website) is targeting with its communications, and the 'message' is poorly communicated.	FIM should identify <i>what it intends to communicate to whom, how, by which means, and with what overall purpose</i> . As part of this process, FIM should analyse the different target groups (or key stakeholder groups of relevance to FIM) and their different need for and use of information.
FIM's <i>website is not interactive</i> , despite aiming to strengthen interaction and be a setting for the expression of a plurality of views, participatory dialogue, reflection, and active learning	FIM should consider adding an <i>interactive forum to the website</i> and generally encourage users to participate actively
The website communication is ' <i>heavy</i> ' and <i>esoteric</i> to new users	FIM should <i>lighten</i> its communication on the website, and provide summaries of the case studies and papers to make it more user-friendly
Interactions with the <i>media</i> have been low-key and ad hoc with no policy statement to guide future interactions	FIM should develop a <i>policy statement to guide relations with the media</i> in a systematic fashion. FIM could choose a fairly low-key media profile for itself, while still playing an intermediary role in terms of brokering contacts and knowledge from the South related to multilateralism.

g) The Sida-FIM partnership

Key findings	Recommendations
The selection process for identifying FIM as a Sida partner, as well as the ongoing contacts between Sida and FIM are largely <i>personal in nature, and limited</i> to the NGO division. A more institutional anchoring to fully use FIM's strategic advantage would be desirable.	<i>Related Sida departments</i> other than the NGO division (e.g. the division for multilateral development assistance, or MENA) should be consulted when a new Sida-FIM cooperation framework is drawn up, in order to identify potential cross-departmental benefits and more strategic use of FIM outputs and results.
It is difficult to identify <i>specific results from general core funding</i> , even if continued institutional support will be essential for FIM's organisational consolidation over the next programme period.	A wide interpretation of results is needed in this area of work, and evidence should be sought to prove and <i>track graduated progress</i> in FIM's influence on certain groups of actors (e.g. constituent CSOs) or processes (rather than focusing reporting on a list of outputs). FIM's <i>institutional consolidation</i> and development should be seen as one of the important result areas to 'justify' core funding, with specific benchmarks agreed upon between FIM and Sida.
The practitioner-based cases of academic standard, produced annually for the FIM fora, are not necessarily used for learning or discussion within Sida.	Explore ways to <i>increase internal learning from lessons</i> on the civil society-multilateral interface within Sida and with Swedish NGO framework organizations by using FIM practitioner cases as teaching cases on courses and seminars of the Sida Civil Society Centre (SCSC). Another way would be to organise <i>informal dialogue opportunities</i> between Southern civil society leaders and the relevant departments in Sida (multilateral division, MENA...).
FIM's <i>mobilization capacity of Southern civil society leaders for informal dialogue</i> and inputs into specific policy processes are not fully taken advantage of in the current cooperation between Sida and FIM.	The area of <i>informal dialogue, informal diplomacy, and increased exchange</i> between Southern civil society leaders and officials holds a lot of potential, building on FIM's lessons from work around the G8 and OIC. FIM should <i>explore using this niche advantage</i> , describe and put down some conditions on paper, and make it a more <i>prominent part of the FIM 'portfolio'</i> of activities and outputs.
Overall there is a <i>good fit</i> between Swedish strategies and interests and FIM.	Continued <i>institutional support</i> for a period of time will be needed, complemented by <i>measures to make the partnership more strategic</i> .

1. Background and Context

Sida supports a number of international organisations with the overall objective: *‘to promote a vibrant and democratic civil society that improves the possibilities for poor people to improve their living conditions’*. The support to international organisations is also aimed at (i) making important knowledge and competence available for Sida and the framework organisations and, (ii) supporting international processes where the role of civil society organisations in the development agenda is in focus.

Forum International de Montréal (FIM) is an organisation active in the area of democratising global governance by strengthening the voice of Southern civil society in multilateral processes. Since 2006, FIM receives both core funding (institutional support) and project specific funding from Sida for their initiative with civil society from the Muslim countries and communities in relation to multilateralism and the Organisation of the Islamic Conference (OIC). Along with Oxfam-Novib, Sida is currently one of the two donors providing institutional support to FIM.

An evaluation carried out by Oxfam Novib in 2006 noted the need for FIM to consolidate organisationally and financially to address a number of issues calling for fundamental organisational transformation. According to Sida’s assessment memorandum from February 2006, an external evaluation of FIM should be carried out in 2008, in response to the Novib evaluation.

The recommendations from the 2006 evaluation will serve as a point of reference and baseline in this assessment. The main objectives of this assessment are:

- To assess the level of implementation of the recommendations, i.e. the progress of implementation of the action plan,
- To assess the adequacy of the organisational structure and format in relation to the stipulated objectives of FIM.

In addition to focusing on *organisational structure* and *financial management*, the assessment also studied the capacity and competence of FIM to *communicate* and interact with their constituency around their activities and programmes. The TORs also clearly set out that the assessment should serve as a *learning tool* both for FIM and Sida.

2. Approach and Methodology ⁵

The assessment took place over a period of 20 consultancy days between September–November 2008. In order to cover the scope and evaluation questions detailed in the TORs (see Annex I), a systems approach was adopted, where the organisation is understood as a set of *complex adaptive systems*, functioning primarily on the basis of interrelationships between people, groups, structures and ideas⁶. The resulting patterns of interaction drive behaviour, events and outcomes.

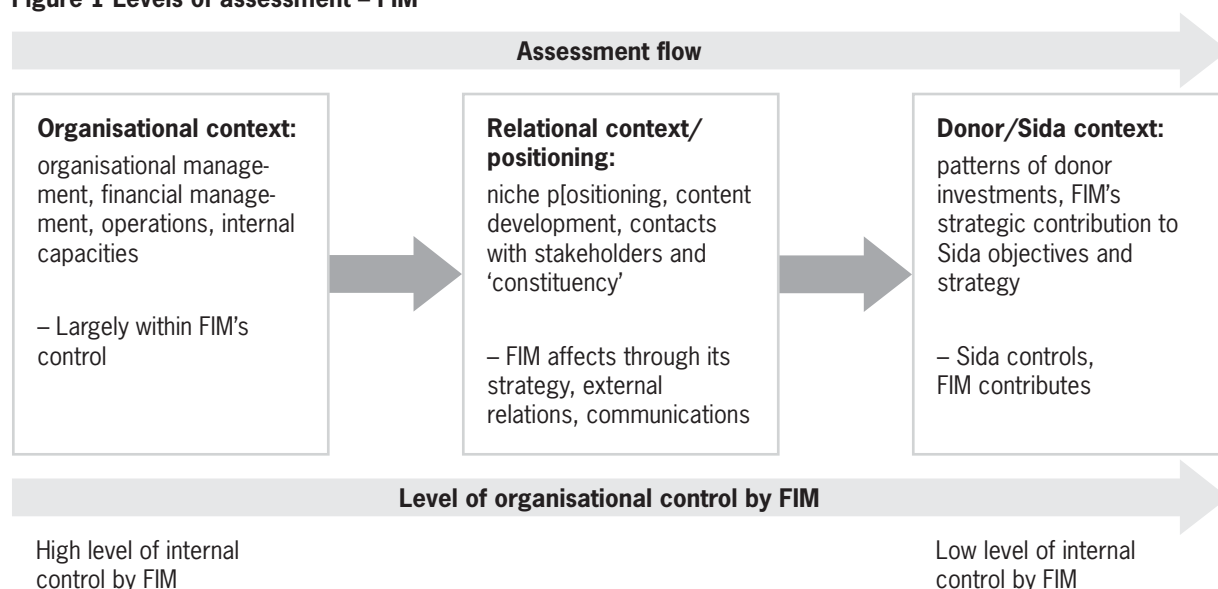
For FIM, there are three main levels or ‘systems’ which need to be considered: (i) the *internal organisational and operating environment* of FIM, with emphasis on internal structures of the secretariat, financial management, capacities, values and work processes, (ii) the *relational context* in which FIM operates and communicates with the rest of the world, including through its selection of programme activities and

⁵ For a detailed description of approach and methodology, see Annex III.

⁶ Capacity, Change and Performance, ECDPM, 2008

niche positioning, and (iii) how FIM fits in within the *Sida system for support to international organisations* and how FIM contributes to Sida's overall objective and strategy in this field. These *three main levels* or operating systems for FIM, as well as the work flow of the assignment is illustrated in the below figure:

Figure 1 Levels of assessment – FIM



Four crosscutting aspects of evidence-gathering and analysis run across all levels:

- an estimate of progress on implementation of the 2006 evaluation recommendations, (including other emerging issues)
- major learning points, including degrees and forms of organisational learning (where applicable),
- views of external stakeholders and emerging communications issues⁷, and
- adequacy of organisational structure and format in relation to FIM's stipulated objectives, leading to some key findings and recommendations.

Methodology: A complete overview of the methodology used can be found in Annex III. The consultancy included literature review, institutional audit and face-to-face interviews with FIM Secretariat and other stakeholders in Montréal during five days (end Sep. 08), a questionnaire to Board Members and key contributors, and a shorter questionnaire to randomly selected CSOs in the field of global governance (see Annex IV). Finally a niche plotting tool was adapted and employed to identify and illustrate areas of strategic relevance to the Sida-FIM collaborations in the future (see Chapter 5).

⁷ As per request in the TORs.

3. Findings at Organisational Level: Management and Governance

A first literature review showed that at the organisational level, the main issue was not whether organisational changes had been undertaken since 2006. Rather, while the 2006 evaluation called for a ‘consolidation of the gains’ since FIM’s inception in the late 1990s, its conclusions together with a financial deficit⁸ incurred in 2005–06 led to a drastic organisational restructuring. This included an office move in late 2006, and a near complete staff turn-over in the FIM secretariat (two out of three full-time programme staff were laid off, with an Administrative Assistant having departed one and a half years before without replacement), and a streamlining in staff functions as well as programmes. This reduced running costs⁹ considerably.

It would therefore be more appropriate to regard the *complete organisational restructuring from 2006 to 2008* as something that has *set the stage* for consolidating the gains. With the improved and stronger organisational foundation emerging from the two-year restructuring period, it is only during the next programming period (2009–2011) that one can expect an actual *consolidation*.

Considering the above, the *key questions* are: (i) how has the organisation coped with such fundamental transformations and staff turn-over?, (ii) how did it affect the knowledge and network base which is the core of operations?, (iii) what kind of transitional issues are likely to occur during the consolidation period?, (iv) have changes led to learning and insights at an organisational level that influence performance positively or negatively?, (v) does institutional funding help to consolidate FIM as an institution (if so, how), and (vi) how can future funding deficits be avoided?

3.1 Financial Management and Budgets

a) Progress on 2006 evaluation recommendations

Overall, the necessary financial and organisational changes identified in the 2006 evaluation have been well handled and managed by FIM, who went even further than called for in the evaluation report. Some concrete actions and evidence of progress are summarised in the below list.

- *Ensuring tighter financial management and oversight* (Rec. 18);¹⁰ The system of financial management has been entirely revised and considerably strengthened since 2006. FIM has hired a full-time Office and Programme Administrator with experience in financial administration as well as from the non-profit sector, who is in charge of tracking and following the financial situation on a day-to-day basis. Bookkeeping is outsourced to the development consultancy firm Universalialia, which specialises in evaluations and organisational assessments, using their qualified staff and accounting system Epicor. The outsourcing of financial management is assessed to be an appropriate and cost-effective option that reduces the risks for over-spending and considerably improves the quality in terms of timely reporting and oversight, making ‘future deficits impossible to occur’.¹¹ The Office and Programme Administrator came on-board in early 2007, and the new accounting system was installed for fiscal year 2007–2008. Regular financial reports are now available on a monthly basis to the Executive Committee, comprising the CEO, Board Chair and Treasurer.

⁸ This was incurred in connection with the conference G05, and overspending on the KL meeting of the OIC project.

⁹ E.g. by moving to other offices, hosted by another organisation (Universalialia) and outsourcing as many services as possible instead of keeping dedicated full-time staff. Current staff composition (roles and positions) was also reviewed and changed.

¹⁰ The number refers to the summary of recommendations in the 2006 evaluation.

¹¹ Direct quote from FIM auditor who prepares the organisation’s yearly financial statements.

- *Addressing the funding deficit legacy, and developing a financial consolidation plan* (Rec. 17); A deficit relief plan was drawn up and approved by the Board. However, the initial goal to eliminate the deficit by the end of FY 07/08 was not met since initial restructuring efforts (office move, staff lay-offs and new recruitment processes) led to a temporary increase in costs. The accumulated deficit was nevertheless decreased¹², with the likely projection that the deficit will be eliminated by the end of FY 10/11. FIM finished the year 07/08 with a surplus of \$24,257 CAD (approximately 143,000 SEK), which was achieved through strict financial control. No project dedicated funding or donor core funding can be used to pay back the debt.
- *Budgeting to include analysis, documentation and dissemination of outputs and outcomes of FIM activities and programmes* (Rec. 4, aspect 1); A part time contractual position was created; a 'Research and Programme Coordinator' with the responsibility to co-ordinate all research activities and improve the quality and effective creation, analysis, documentation, and dissemination of outputs from FIM events. As funds become available, the Research and Programme Coordinator is to be made a full-time position.
- *Including a line for 'extended convening' in the FIM annual budget, to permit immediate follow-up and development of promising new ideas* (Rec. 7, aspect 2); Efforts were made to include such a budget line, but it was difficult to attract funding. The concept of 'extended convening' is not clearly spelled out, and many donors still prefer to provide funding on a meeting-by-meeting basis. This will be a critical area for FIM as an institution as well as for some of the project initiatives, like Building Bridges, which depends on long-term and steady funding.
- *Recalculating the formula by which salary and overhead costs are charged to projects, negotiating a percentage on all projects that accurately reflects all fixed and operational costs* (Rec. 15); All FIM's fixed operational costs are currently covered by core funding, and a percentage of administrative overhead costs and consultancy work are included in project budgets. Each project includes the required overhead and/or salary mark-up to achieve reasonable surplus. However, salary costs are currently entirely dependent on core funding, especially with a streamlining of activities and more focused selection of intervention areas in a phase of organisational restructuring and consolidation. This is still a cause of concern since FIM would need very large, or several medium-sized projects, in order to shift salary costs from core funding to project funding. There is no immediate prospect for doing so, and at the same time, the level of core funding is likely to decrease in 2009 with Novib reaching the end of its term in providing core/institutional support to FIM.¹³
- *Negotiate core, multi-year funding for FIM's essential infrastructure and operations* (Rec. 16). Although a multi-year support grant to cover FIM's essential infrastructure and operations would be highly desirable, FIM is facing a funding dilemma: on the one hand needing to shift more operational costs (and salary costs) to project funding, and on the other, trying to focus and downscale on projectised funding in order to consolidate the gains in its core areas of operations over the next period.

Currently, Sida together with and Novib are the only two core funding bodies, and this will change as of 2009 when Novib shifts focus in its funding relations with FIM. Strategies for how to attract additional sources of core/institutional funding by making a clearer strategy and results-framework is are discussed below.

¹² A decrease in 07/08 with 31% from \$ 77,620 CAD to \$ 53,363 CAD.

¹³ Novib funding is likely to continue on project-basis, but it is a policy to only provide core/institutional funding over a limited number of time (6 years).

b) Major learning points (financial management)

The 2006 evaluation report together with the financial deficit following the G05 conference, set off the major restructuring that has occupied the organisation over the last two years. The financial management system and internal controls were therefore at the centre of the restructuring.

Some of the key lessons noted internally were:

- *Not replacing the vacant Administrative Office in 2005 was a mistake.* At the time, it was considered that each staff member (three full-time permanent staff and two full-time contractual staff at the end of 2005) could take an individually bigger responsibility for budgeting, administration and financial management. Not filling the vacancy was also a way of cutting down operating costs. However, the dispersed administration led to a lack of central oversight, which was troublesome especially in relation to administering and keeping track of conference costs.
- *An imbalance between programme and administrative/supportive staff* was also created by the departure of the Administrative Officer in 2005. FIM found itself with overlapping competencies on the programme side (e.g. between the CEO and Programme Director), and no competence and capacity on the support side. This led to the lay-off of existing programme staff (apart from the CEO, who was kept part-time), and a redefinition of the support function in the Office and Programme Administrator position (as of 2007).
- *Additional accounting support was brought in on an ad hoc basis whereas full-time professional staff was needed to administer the FIM bookkeeping.* This was particularly the case during labour intensive periods around the organisation of big conferences with a multitude of funding sources. Ad hoc accounting support also made financial reporting uneven and caused delays in the reporting.
- *More rigorous budgeting based on real costs helps avoid future over-spending.* In the past, there was a tendency to go ahead with spending of resources in the anticipation of forthcoming grants. Committed individuals and leadership were ready to put their own money into the process to bridge gaps. This practice, however, proved unsound, as also pointed out in the 2006 evaluation, with the last-minute withdrawal of anticipated conference funding in 2002. The institutionalized lesson in this regard, is to do more rigorous budgeting based on real costs (by the Office and Programme Coordinator) and only spend money that has been received, even if it causes delays.
- *The big conference events (G02, G05) led to recognition of FIM as an important player in the field of global governance and global civil society, but drained the organisation financially and weakened its human resource capacity (staff burn-out).* It has been discussed and agreed that there will be no *large-scale conferences* in the immediate future – at least until financial and institutional systems have been consolidated and FIM has a more diversified (and stronger) funding base. FIM should also consider organising larger conferences only when it is in collaboration with other organisations and the like, who have the financial and human resource capacity to take on the task (e.g. Civicus, and others).

The system for budgeting and financial management was entirely revised based on these realizations and other factors related to the organisational restructuring. The relation between the Universalialia financial management team (in charge of day-to-day bookkeeping), the Office and Programme Administrator, the CEO and Executive Committee¹⁴ and the Board in relation to financial management has now been institutionalized, and is adequate for managing the finances of the organisation. Individual and organisational learning has also taken place and work processes have largely been adapted.

¹⁴ Consisting of CEO, Board Chair and Treasurer.

Views from stakeholders:

"Every international donor ... nowadays has its own agenda which it wants to support: will civil society's own agenda not be fundable in the future?"
(FIM Board Member)

"A similar programme in one of the academic institutions would have 'consumed' several million dollars per annum, and many donors would have funded them easily. I am concerned about the long-term sustainability of FIM."
(FIM Board Member)

c) Key findings and recommendations (financial management)

Key findings	Recommendations
Overall finding: An overall finding, closely linked to the issues related to financial management described above, is that the financial deficit in 06, together with the evaluation recommendations (J. Christie, 06) led to an organisational restructuring of FIM that went far beyond the recommendations outlined in the evaluation report. Strengthened financial management, the need for tighter financial controls, and sustained funding stood at the centre of this restructuring.	Although improved and strengthened systems are now in place, the next programming period should be considered as the actual consolidation phase. As such, <i>transitional issues need to be identified and closely monitored</i>, including the new systems for <i>financial and organisational management</i>.
Financial sustainability: The <i>long-term financial insecurity</i> of FIM is still an issue that has not been adequately addressed, though ideas and suggestions have been discussed internally and with the Board. Budgets and funding still tends to be <i>event-</i> (e.g. conference) or <i>output-specific</i> (e.g. a specific research paper or case). This does not address the funding gap in between events for ongoing dialogue, learning and reflection. Neither does it allow for salary costs to be shifted to specific project or event budgets. FIM is facing a <i>funding dilemma</i>: on the one hand needing to shift more operational costs (and salary costs) to project funding, and on the other, trying to focus and downscale on projectised funding in order to consolidate the gains in its core areas of operations over the next period. During the next programming period of further consolidation of organisational practices and systems, <i>minimal but steady core (seed) funding is required</i> to give FIM the space and security to address some of these internal issues.	Ideas and plans for FIM's sustainability and the diversification of <i>funding sources for its running costs</i> should be formulated in a <i>long-term sustainability plan</i> with options and 'coping strategies' to deal with funding fluctuations. This is particularly relevant since Sida is potentially the only multi-year donor providing institutional support to FIM as of 2009.¹⁵ A <i>clearer institutional results framework</i>, and clearer language and explanations of core competencies and niche placement may help to attract institutional and targeted funding for FIM's activities and operations (see section on results-based management and monitoring). Try to obtain funding for the <i>learning, documentation and communication</i> work of FIM to develop that side further, and to help bridge funding gaps in between more targeted events¹⁶.
Financial management system: Relations between the Universalia financial management team (day-to-day bookkeeping), the Office and Programme Administrator, the CEO and Executive Committee and the Board in relation to financial management have been institutionalized, and enable appropriate financial management of the organisation.	Close attention to how the new system of <i>financial management works in practice</i> will be important over the next period. Additional human resources capacity in the area of financial management may be necessary if FIM receives any larger grants for e.g. the Building Bridges project¹⁷.

¹⁵ A sustainability plan was discussed already in the Sida Assessment Memo of 2006, but due to the organisational restructuring FIM was unable to focus on these issues until the restructuring was completed and the debt reduction plan was in place.

¹⁶ Smaller grants in this area have been obtained from IDRC to develop the website, Ford Foundation and others in the past, but on a small-scale and ad hoc basis. With the new Research and Programme Coordinator in place, FIM stands a good chance of attracting longer-term funding in this field.

¹⁷ FIM has submitted applications to attract funding to the Building Bridges project to a number of sources, including the European Union. However, the outcomes of these applications were still unknown at the time of the assessment.

3.2 Results-based Management and Monitoring

Attempting to assess the long-term impacts of FIM's operations would be close to impossible. On the other hand, FIM would gain from focusing more on *intermediate results* beyond the outputs level of stand-alone activities, and to track FIM's influence on *key actor groups* and stakeholders over a longer period of time. This would go beyond the current monitoring and evaluation (M&E) practice, which is largely limited to pre- and post-event feedback questionnaires. Tracking and collecting 'results' of relevance to the organisation's strategic plans and organisational development would also enable FIM to use this evidence in its communications to external stakeholders, donors, and to make a stronger case for its added value in this area of work.

Views from stakeholders:

"There is this new and fanatical religion among donors called results...."

Although the 2006 evaluation did not go into these issues in great depth, it is an area that is of *high importance* in the current consolidation phase, so that FIM can regain, renew or establish sustainable funding arrangements with its funders.

a) Progress on 2006 evaluation recommendations

The 2006 evaluation had only a few recommendations related to a strategic and results-based management framework.

One of the three recommendations – to map what other organisations are doing in the field of 'global civil society, multilateral institutions and global governance' – was by the Board considered to be unfeasible and of little priority for FIM. Instead, this assessment recommends that FIM should consider undertaking a strategic 'niche plotting exercise' together with Board Members at an upcoming Board Meeting or 'simply' develop a strategic plan (see recommendations under 'niche, mandate and positioning').

Progress on the other two results-based management related evaluation recommendations from 2006 is accounted for below:

- *Ensuring that indicators are identified at the outset of new programmes, which will allow FIM to monitor outcomes* (Rec. 10, aspect 2); FIM states objectives, risks, and expected outcomes in project proposals and for project activities and engages with programme donors in risk analysis and identification of milestones and outcomes (notably Novib's Toolbox).

Views from stakeholders (FIM Forum 08):

"Well planned, good presentations, mess of objectives."

"We needed an objective better suited for this kind of diverse forum. The objective seemed more designed for a homogenous organisation with a campaign."

"More pro-active facilitation would be helpful to increase quality of facilitation."

"Great selection of participants, from different regions, sectors etc., and all of great quality."

In the FIM application to Sida for funding 2005–08, a programme framework was included with identified programme areas, activities/means and expected results¹⁸. However, result formulations are generally vague, there is no monitoring framework for how to track, gather evidence on, and demon-

¹⁸ FIM Programme Framework, Overview Table, October 2005

strate results (especially not beyond the outputs level), no measurable indicators, and no prioritised benchmarks for tracking progress of FIM influence on key ‘target’ groups or stakeholders over time (e.g. change in knowledge or practice among CSOs attending FIM fora or Building Bridges activities).

Further, there is no budget allocation set aside for results-based monitoring, learning and reflection (beyond the FIM fora) or for self-assessment beyond what is covered in the day-to-day work by the Secretariat staff as part of their general job descriptions.

- *Designing and administering pre- and post-programme questionnaires for at least one of each type of FIM activity, to establish some baseline data on how FIM events affect participants, and how they use the experience (Rec. 11);* Current practice is to carry out event-specific evaluations of each particular event in order for FIM to learn how to improve on format, contents and methodology for conducting the fora/dialogue meetings. Beginning with the 2008 Forum, a pre-conference questionnaire was being used to track participants’ views ‘before and after’ the event. The questionnaire gives a rapid idea of the level of satisfaction of participants in a given event. Feedback gives generally good to very good rankings (averaging between 3 and 4 in a scale of 1–5). Although useful to improve and learn about specific events, this tool needs to be complemented by (or fed into) a framework to track longer term results and influences on stakeholder groups.

b) Major learning points and observations

Monitoring systems and results frameworks can be perceived as overly bureaucratic for a small organisation with a tight team of three Secretariat staff members¹⁹ who interact on a day-to-day basis.

Current practice is to regularly share information on programme performance internally, and a brief update from the CEO is sent to Board Members on a monthly basis. Specific milestones agreed upon with donors (as with Novib) are also regularly reported on according to each donor’s respective format and style.

Views from stakeholders:

“The reorganisation was challenging but has improved strategic focus...”

(FIM Board Member)

However, without a written strategic and results-based management framework there is a risk being ‘pulled off track’ due to a number of factors, such as donor priorities in the pursuit of funding, individual interests by Board Members etc. With donors (in particular Sida) being more prone to focus on results, here is also an interest for FIM to establish its own strategic plan and results framework to justify continued funding. Right now, there is a gap between the very high-level vision and mission of FIM, and the very detailed activities carried out to produce specific outputs. Considering that FIM will be facing a leadership change of both the CEO and Board Chair in 2009, it is critical that the organisation has a clear strategic framework for how to measure and gather evidence to document progress towards a limited number of results areas (with relevant indicators).

Although little progress seems to have been made in the area of strategic framework and results-based management, since the 2006 evaluation, FIM secretariat staff is committed to prioritize it in this next phase of organisational consolidation. In addition to project specific indicators, which were discussed in the 2006 evaluation, it is important to review and make sure that the entire results chain and logic is reviewed and strengthened – from vision, mission through to intermediate level objectives (or outcomes/results) down to specific activities and outputs. Any funder considering supporting FIM institutionally should ensure that money and time is set aside and earmarked specifically for strategy development and ongoing monitoring and follow-up on key indicators and results, at organisational as well as

¹⁹ CEO, Research and Programme Coordinator and Administrator

project-specific level. To track FIM's influence in longer term processes, an actor-oriented approach as enshrined in Outcome Mapping may be useful.

c) Key findings and recommendations (results-based management)

Key findings	Recommendations
Strategic plan and results-framework: Apart from the yearly FIM Forum and Board minutes, FIM does not have an <i>overall strategic plan and results-framework</i> to reflect how activities contribute over time towards long-term results. On the one hand, one can argue that this makes a small organisation like FIM <i>more flexible</i> and able to act and react as needed to upcoming needs and events. On the other hand, a well-constructed strategic plan should set the framework and be a <i>living and adaptable tool</i>, with the right RBM instruments attached to it. It should <i>reduce, rather than increase the administrative burden</i> over time. <i>Intermediate level results</i> (between the mission and specific outputs and milestones) are not well captured, measured/assessed or tracked over time. Work on developing organisational and project specific indicators have been delayed due to the restructuring, but it would be <i>timely to prioritise</i> this at the beginning of the next funding phase.	As part of any new/renewed agreement about institutional funding as of 2009, FIM should make sure to earmark funds to develop an <i>organisational strategic plan</i> and results-framework with <i>key indicators</i> at organisational and project levels (around 5–10 organisational level indicators used in the reporting to track progress on strategic objectives and relevance of niche placement). Make sure that <i>intermediate results</i> are captured and tracked over time, with an analysis of results included as part of the regular reporting (not just a list of outputs). Agree with funders on a streamlined <i>reporting framework</i> that reflects and connects specific stand-alone activities and events to the overarching strategy and intermediate results (i.e. beyond outputs). Consider using a <i>learning and actors-oriented approach</i> that focuses on tracking influence and effect of FIM activities on certain groups/ actors/ stakeholders over time (such as e.g. Outcome Mapping, mixed with other tools and instruments as needed).
Funding for results-based management and documentation of lessons: Currently there is <i>no financial allocation</i> set aside in FIM's yearly budget (FY 08/09) for developing a strategic plan and results framework with a number of key indicators to be tracked over time.	Any funder wanting to support FIM institutionally should ensure that <i>money and time</i> is set aside and <i>earmarked specifically</i> for strategy development and ongoing monitoring and follow-up on key indicators and results. FIM also needs to make the <i>budgetary allocations</i> for this as part of their core activities.

3.3 Management and Organisational Governance

The previous evaluation did not have many recommendations in the area of management and organisational governance. However, since 2006, there have been major developments in this field as a result of the organisational restructuring. Of the two 2006 recommendations, one addresses the issue of succession planning of senior staff and Board Members, which is now particularly relevant, as the current CEO (and founder) has announced that he is stepping down. This will coincide with the end of term of the current Board Chair and co-founder, in 2009. Obviously this entails yet another drastic change in the organisation.

a) Progress on 2006 evaluation recommendations (organisational governance)

- *Involving the Board in addressing findings from the 2006 evaluation, FIM mission, programme planning, Board roles and responsibilities, and involving Board Members increasingly in fundraising* (Rec. 13 and 14); Following the 2006 evaluation, the FIM mission was deliberated and revised by the Board (see section on 'niche, mandate and positioning') at the annual Board Meeting²⁰. There was also some progress on Board Members playing a representational role in relation to donors and in connection to the G8 project. However, their role in fundraising is delicate as their individual organisations sometimes compete for the same tranche funding with foundations or international donors.

²⁰ The Board meets physically once a year in connection with the FIM Forum.

Views from stakeholders on the CEO succession issue:

"I think it will affect the organisation immensely – [the current CEO] has been key in keeping the FIM ideals alive in constrained circumstances..."
(FIM Board Member)

"The right person will build on what exists, and inject fresh impetus (provided she/he has secured funding), so I don't see the [the current CEO] transition as dramatic, – just regrettable."
(FIM Board Member)

"The strong and long-lasting leadership from competent southern civil society leaders is vital..."
(FIM stakeholder/key informant)

- *Addressing the issue of succession planning for senior staff (CEO) and Board Members* (Rec. 20); An advertisement and job description for the position as CEO has been circulated in the FIM network and is currently posted on the FIM website. So far, there have only been a few candidates, and none of these have received the Board's endorsement. There are also uncertainties related to next year's funding, and the possibility of offering a competitive salary to a well-suited candidate. How and when the change in CEO as well as Board Chair takes place will undoubtedly include a considerable risk for the organisation, given the particular nature and character of FIM – a small organisation which, since its inception, has been heavily dependent on the founder (CEO) and co-founder (Board Chair) in terms of networks, knowledge, vision, energy, commitment and methodology.

Ways of mitigating the risks involved in this management transition have been discussed at FIM Board meetings and informally. One way is for the current CEO to stay involved in a limited capacity to ensure that the networks and knowledge is transferred and institutionalised. Another possibility is to maintain a role for the current CEO in fundraising and external relations. However, a proper risk mitigation plan needs to be developed, with a clearly defined task division between the outgoing and incoming CEO.

A more institutionalised approach to keeping former Board Members involved in FIM has also been discussed between the FIM Secretariat and the Board. Board composition, rotation, and the selection of Board members (including geographical and other criteria) have so far mostly been done through a common understanding between current Board Members and the CEO. However, spelling out some of these practices will help to mitigate the risk of FIM being politicised or geographically biased based with new leadership and Board Members coming in.

b) Major learning points

In terms of organisational management and governance, certain lessons can be or have been learned:

- *Staff changes:* The need to drastically cut back on operational costs in 2006 led to a re-examination of staff positions and functions. The lay-off of two programme staff members resulted in the loss institutional memory as well as some network contacts. However, linking into the academic environment of global studies was strengthened with the part-time consultancy²¹. To reduce the risk of a conflict of interest, the Board decided to make the consultancy a permanent Research and Programme Coordinator position, also in the interest of having someone knowledgeable of FIM's institutional development fulfill that important role.²²

²¹ This staff member has senior experience in the field of academia, learning and communications with a wide network in the academic world in Canada and internationally. She also took an academic course in 'civil society building' with one of the FIM partner organisations as part of her preparations for this job.

²² The person in the position is also the wife of the founder and CEO. However, the risks for conflict of interest are mitigated by the fact that the CEO about the same time announced that he would step down from his position and play a more strategic/supportive role in the future with limited management responsibilities.

The need to lay-off one Programme Director and one Programme Officer in 2006 were caused by an early expansion of the organisation which later turned out to be unsustainable considering funding gaps in between key events and more targeted interventions and donor support (e.g. for G02, G05). The recruitment, through a competitive process, of an Office and Programme Administrator with both financial and programme responsibilities was an important step in the reorganisation process. These staff changes led to major changes both in individual learning, changed working relations among Secretariat staff and new work processes put in place between a ‘tighter’ team with more complementary skills and functions than was previously the case.

- *A ‘lean’ organisation is more flexible and cost-effective:* There has been the realization that as a small team with operational running costs held at bay, FIM has more flexibility to act and react to issues and opportunities in the organisation’s field of work, and can serve the FIM Board and Building Bridges Steering Committee more appropriately. It is therefore a conscious decision to keep a small secretariat as the organisation’s nucleus with minimal overhead costs. This makes FIM a cost-effective option for donors who want to support interventions in the area of global governance.

However, it should also be noted that FIM, in the aftermath of the reorganisation, is now operating and delivering on programme objectives with the ‘bare minimum’ in terms of human resource capacity. As a result, certain areas that are critical to FIM’s organisational survival are put on hold (such as developing a strategic plan and results framework, institutionalizing work processes and practices, developing and implementing a much needed communications plan etc.). To ensure sustainability, this situation is not tenable.

c) Key findings and recommendations (organisational governance)

Key findings	Recommendations
Board composition rotation and roles: The FIM Secretariat considers the Board Members as the <i>main strength</i> of FIM, given that they are prominent civil society leaders from around the globe, or renowned academics in the field of global governance. The FIM Board Chair is stepping down in 2009 after 10 years as Chairman, and a rotation system is being introduced with new members elected onto the Board. With an increasing rotation of Board Members, and more new Board Members coming in, there is a risk that FIM loses its focus or is pulled off track, unless these new members fully understand and support FIM’s unique niche in its field of operations.	<i>Terms of Reference for the FIM Board</i>, detailing its role, division of labour between the Board and the FIM Secretariat, its decision-making and advisory functions etc., need to be clearly stipulated and made accessible on the website as part of the information about FIM. An annex to the TORs for the FIM Board should spell out <i>Board composition, rotation schedules, proposal and selection procedures</i> for new Board member candidates. The <i>role of the FIM Board</i> in relation to the Building Bridges project, which is governed by its own logic and Steering Committee, is somewhat unclear and needs to be spelled out. A special <i>orientation for new Board members</i> should be introduced. The role of former Board members in such an orientation scheme can be explored.
Secretariat staff management issues: The reorganisation has drastically reduced operating costs, but has left the organisation with the ‘bare minimum’ in terms of human resources capacity and operating margins. The current CEO and Research and Programme Coordinator are paid only part-time work but work full-time, based on their own personal commitment to the cause of FIM. Although admirable, this is not sustainable for the organisation in the long run, and will make it difficult to attract the right candidate for a successor CEO.	While a lean organisation can be considered flexible and cost-effective – especially since it still manages to deliver on programme objectives with very small means – <i>expansion of at least core functions</i> (CEO and Research and Programme Coordinator) to full-time paid positions, as well as the recruitment of an additional <i>full-time junior communications officer</i> would be required (see justification in section 4).

Key findings	Recommendations
CEO (and Board Chair) successors in 2009: The shift in management leadership (appointment of new CEO) and the shift in Board Chair constitute <i>a major organisational risk factor</i> over the next couple of years. On the other hand, <i>conscious (and cautious) steps</i> to avoid the “founder’s syndrome”²³ should be seen as positive for the organisation’s long-term sustainability.	A <i>risk mitigation strategy</i> should be developed to address some of the issues relating to the transitional period (including the particular role of the former CEO in providing institutional support). By developing an <i>overarching strategic plan</i> and key result areas (referred to above), and by institutionalising those work processes that currently work well, the risk of being pulled ‘off track’ by new incoming people and interests will be considerably reduced. It will also serve as a helpful guidance to the incoming CEO.

4. Findings at ‘Relational’ Level: External Communications and Areas of Engagement

FIM’s role in its operating environment and in its relations with constituents has been assessed. Three main areas are covered: (i) the FIM niche, mandate and positioning in the sector of global governance and global civil society and multilateralism, including the unique characteristics of FIM as a facilitating and convening, rather than advocacy body, (ii) the selection of programmatic areas of engagement, and (iii) communication with stakeholders and constituency.

With the organisational restructuring being at the centre of FIM’s attention the past two- to three-years, there has been less progress and learning in terms of strategic positioning and external relations. Nevertheless, some positive steps have been taken, and the FIM Secretariat is aware of the urgency and importance to delve further into this field during the coming consolidation phase.

FIM is right now is at a cross-roads, with new management and Board Chair expected to come on-board in 2009 – described by some stakeholders as a ‘generational shift’ in FIM. This will inevitably affect the way FIM presents itself and is perceived by external stakeholders, as well as the language used and the communication channels employed. All the same, it is the view of the assessment team that a re-examination of FIM’s strategic position, external relations and overall communication approach will greatly assist whoever takes over the leadership of the organisation.

To date, the communication strategy of FIM has been implicit, in terms of identifying and conveying a clear message (image) about the organisation and its operations. There is no explicit communication strategy that clearly states how FIM’s approach to communication contributes to the achievement of FIM’s overall mission. The profile and needs of FIM’s key stakeholders (or ‘target audience’) has not been analysed and consequently FIM has no clear approach for how to reach its target group (see also section 4.3).

The next programming phase provides the opportunity to take the issues of communication and external relations further. FIM has valuable communications capacity, with the Research and Development Coordinator. However, her time is limited (it is currently a part-time position), and a full-time (possibly junior) communications officer is needed to drive this process forward. It is also timely and necessary to firm up operations in this field. With a potentially larger degree of rotation in Board Membership foreseen in the future, it is critical that both Board Members and the Secretariat share the

²³ Refers to the phenomenon where an organisation remains entirely dependent on the founder(s), and where no institutional mechanisms are put in place to ensure the survival of the organisation beyond the involvement of the founder(s).

same understanding, and use a 'common language' to describe the mission, vision and niche of FIM. The vagueness in much of the language and terminology used to describe FIM today can easily lead to misinterpretations, or make potentially useful stakeholders lose interest.

Who is the main FIM constituency? What processes (and whom) is FIM trying to influence?

All stakeholders interviewed for this assessment (FIM secretariat, Board Members, key informants/academics and other external actors in civil society) seem to have a relatively clear understanding of who the main stakeholder groups of FIM are: (i) civil society organisations in the South and in the North, (ii) academics focusing on global governance/global studies and multilateral processes, (iii) officials in multilateral institutions/processes, and (iv) policy-makers (government officials, donors). These groups can of course be broken down in more defined sub-categories. However, there were differing views about their order of importance where some saw academics as the *main* target group, while others believed that *civil society from the global South* is the main 'beneficiary'.

A current Board Member is of the view that FIM's role is primarily that of "...making the voices of civil society of the Global South heard in pre-dominantly *Northern-led* processes affecting global governance (such as G8, UN, Bretton Woods Institutions, others) and among Northern academics who write about the South." The FIM mission statement, on the other hand, identifies FIM's role "... to strengthen the influence of the voice of Southern civil society *within civil society* in all debates and activities affecting global governance."

Key questions in this area of inquiry are: (i) as a small organisation with a big mandate, what is the exact scope and remit of FIM's contribution (why is it needed, is it still relevant)? (ii) how can FIM best capitalize on its unique knowledge and experience in its defined niche?, (iii) is FIM able to relate to the necessary stakeholders within its operating context (who and how)?, (iv) how is FIM perceived by 'external' CSOs who may not have followed FIM very closely over the last years?, and (v) can the language describing FIM be more-to-the point?

FIM Mission Statement

(revised as a follow-up to 2006 evaluation recommendations):

"FIM believes that the stated goals of the UN are beyond reasonable reproach and that the challenge of FIM is to assist meaningfully in bringing them to fruition. FIM believes that transparent and democratically accountable multilateralism offers the best hope for Global Governance. In order to best meet this challenge FIM endeavours to strengthen the influence of the voice of Southern civil society within civil society in all debates and activities affecting global governance."

FIM's Vision Statement:

(approved at the 2008 Board meeting):

"FIM envisions a world where informed, empowered civil society in all parts of the world participate in global governance; all multilateral institutions are open to participatory democratic processes; inequality based on class, gender and race is absent from every country and from the multilateral system, strong alliances between grassroots movements, civil society networks and committed academics make civil society voices and strategies credible, powerful and effective; and poverty, and all forms of violence are eliminated. FIM's vision of a desirable world is based on values of equality, justice, freedom, peace, dignity and well being for all."

4.1 Niche, Mandate and Positioning

FIM's niche and mandate is assessed in the perspective of what the organisation actually does, its strengths and weaknesses, and how it communicates its 'key messages' to the rest of the world.

a) Progress on 2006 evaluation recommendations

The 2006 evaluation presented two recommendations relating to niche and mandate:

- *Revising the mission statement* (Rec. 1); The mission statement was revised to eliminate the reference to FIM being an ‘alliance’ and to explicitly state its role in relation to Southern civil society. In critically reviewing this revised statement from an outsider’s perspective, however, a few issues emerge:
 - 1 Only the last part of the statement specifically addresses how FIM intends to support the vision statement (“FIM endeavours to...”). Beliefs and values are better suited for the overall vision.
 - 2 The reference to the UN up front is misleading as one gets the impression that FIM occupies itself primarily with the UN system. Even if this was historically the case, it does not reflect FIM’s contribution to democratic multilateralism today which has a wider scope.
 - 3 The language could be more precise, e.g. the term ‘global governance’ could be spelled out in more practical terms (e.g. by use of a ‘purging the jargon’ exercise²⁴).
 - 4 FIM’s particular contribution towards its mission could be spelled out in more detail, e.g. by listing the areas in which FIM works, in broad terms (such as brokering knowledge, providing opportunities for dialogue between Southern civil society leaders and policy-makers, bridging academic and civil society activist interests, etc.). FIM should attempt to distinguish itself, through the specificity of its mission statement, from other key players in the field, stressing FIM’s intermediary role and sole focus on the civil society-multilateral interface as opposed to the issues (causes of poverty or inequality), which is the domain of their network members.
 - 5 A more direct link between the vision and mission statements would strengthen both. For example, if FIM does not specifically intend to contribute to a given area, it should not be stated in the vision statement even if the overarching values and goals are supported by FIM institutionally. To illustrate, the reference to “...inequality based on class, gender and race is absent from every country...” should be eliminated or rephrased considering that FIM does not primarily intervene in country-level contexts.

Language and terminology options...

The use of more precise language to describe FIM and what it does needs to be reflected in all information materials and communications about FIM, including on its role and added value. Terms like ‘global civil society’²⁵, ‘global governance’²⁶ and ‘democratising global governance’ are vague, debated and open for interpretation. Suggestions for terminology by the assessment team to best describe FIM are along the lines of: ...*knowledge brokers; promoting citizens-driven multilateralism; capturing, sharing and providing the space to debate practitioner-based knowledge; providing independent Southern perspectives on issues of global importance, the civil society-multilateral interface...*

In terms of terminology use, it was also noted that references to ‘Muslim civil society’ in the Building Bridges project (Concept note, June 08) may be a misnomer as it does not primarily refer to faith-based organisations, but rather to ‘civil society in Muslim countries’ (faith-based or secular). This can be confusing for external audiences and needs to be better defined in external communications.

²⁴ An example can be found in the manual ‘Outcome Mapping: Building Learning and Reflection into Development Programmes’, S. Earl, F. Carden, T. Smutylo, IDRC, 2001, pp. 34–36

²⁵ See J. Keane, University of Westminster, whose comment on the term global civil society reads: “...like all other vocabularies with a political edge, its meaning is neither self-evident, nor automatically free of prejudice”. *Global Civil Society?* Cambridge University Press, 2003.

²⁶ See R. Higgott, Centre for the Study of Globalisation and Regionalisation, University of Warwick, Working Paper no. 134/04, “Global governance is an over-used and under-specified concept...”

- *Researching other key actors' work in the field of 'global civil society' and defining FIM's mission towards 'global governance' beyond inter-governmental institutions* (Rec. 3 and 12); This recommendation was not considered high priority by FIM in 2006 when internal, structural and organisational matters were more pressing. Moreover, FIM seems to be one of very few NGOs with a solid civil society base that *exclusively* focuses on the *civil society interface* with the multilateral system without taking a position on the issues (apart from FIM being in favour of multilateralism).

All of FIM's network/Board Members have projects or initiatives that deal with the multilateral system, but all from an activist/advocacy point of views. Other groups in the civil society/NGO world with more of an independent mandate (e.g. Bretton Woods Project²⁷), host more policy-oriented dialogue opportunities or carry out research in relation to particular institutions or processes. Such information and dialogue is aimed at informing and engaging civil society organisations for advocacy purposes on the issues themselves (e.g. the global financial and monetary architecture, the MDGs etc.), but does not address the civil society-multilateral interface per se, as does FIM.

Views from stakeholders:

"FIM provides the only space available for free, frank and thoughtful discussions on issues related to civil society engagement in democratizing global governance."
(FIM Board Member)

There are academic institutions, think tanks and foundations that take a role similar to FIM in relation to documentation of cases (or 'best practices')²⁸, carrying out research on global governance, or host consultations between civil society and officials in relation to specific multilateral or regional processes. What differs between such institutions and FIM, however, is that such bodies are rarely 'owned and driven' by southern civil society actors themselves and are often less flexible to act and react to emerging 'learning needs' among stakeholders.

Even so, FIM needs to better define, and document its added value and relevance to ongoing processes and to its network actors.

At the 2009 FIM Forum and Annual Board Meeting in New Delhi, FIM including Board members should consider spending an additional day or half-day on a 'strategic retreat' to carry out a moderated niche *plotting exercise*, and to initiate the process of developing a strategic plan and a results-framework for the organisation. In such a niche-plotting exercise, it will be important for FIM to consider and assess all its different functions as well as where its current and future strengths lie – particularly in relation to its expertise in discreet and behind-the-scene diplomacy (with examples from G8 work and Building Bridges), its ability to quickly mobilize Southern civil society leaders as well as continue to attract 'leading minds' in the field of citizen-driven multilateralism.

b) Major learning points (niche and mandate)

Although there is still much left to do in the area of developing a strategic and forward looking plan in line with the FIM mission and vision, some work has recently been undertaken to document and learn from FIM experiences in the past.

- *Documentation of civil society lessons from FIM's decade of operations*: Internally, there has been some reflection about the changing role of FIM in relation to democratizing global governance over the last decade. A book which focuses primarily on civil society experiences with different multilateral processes (less on the specific role of FIM) will be published later this year, with cases covering

²⁷ See: www.brettonwoodsproject.org

²⁸ See for example the Canadian think tank The Centre for International Governance Innovation – CIGI, funded by the Government of Canada and the Government of Ontario, www.cigionline.org with whom FIM has collaborated in the past.

democratization of the United Nations, the World Bank, and regional multilateralism with a final chapter on how to build capacity and solidarity among CSOs to impact on the multilateral system.²⁹

Lessons from FIM's evolving role in opening up a consultative process between Southern civil society and G8 sherpas³⁰ have also recently been published in collaboration with the Canadian-based think tank Centre for International Governance Innovation.³¹

- *FIM's role as a knowledge broker of practitioner-based knowledge:* Internal learning and changes in work processes can also be noted in FIM's 'knowledge brokering' and intermediary role between academia and the activist/CSO world. Since 1999, FIM has conducted over 35 case studies. However, there have been variations in terms of their quality and usefulness, which has been noted in the previous evaluation and other documentation. In 2007, FIM therefore piloted a new case study method that included a participatory peer review process involving one academic, one practitioner and the newly appointed Research and Development Coordinator in-house, to do the editing. The process sets out clear guidelines for contributing authors and details all the steps involved in identifying and compiling cases.

A report on the pilot year³² concluded that 'engaging academic participatory reviewers has both the potential to substantially increase the validity and learning potential of these studies and to render the process too onerous for busy practitioners to engage in'. Concrete suggestions for how to increase the validity and learning value of the cases were also put forth to be implemented in the fine-tuning of the process. Another option to be considered is to make some of the FIM cases into teaching cases for use both in academic institutions (typically global studies programmes) and within CSOs. It would increase accessibility and widen their use considerably.

Views from stakeholders:

"Linkages need to be strengthened to leading academic research centres in the Global South as well."

"FIM's primary challenge is how to remain relevant, flexible and strategic in the midst of changing donor priorities for funding and shifting governance issues at the regional and global levels..."

c) Views from stakeholders (niche)

Stakeholders with a close connection to FIM (Board members, contributors to cases, FIM forum participants) generally approved of FIM's complementary role as an *intermediary* –between civil society and policy-makers, officials or multilateral processes; between different types of CSOs from different regions or sectors around a common interest (e.g. civil society from Muslim countries and the OIC); between civil society activists and 'committed academics'. An added value of FIM in this regard is that it can play this intermediary role from a civil society perspective (for setting the agenda and for determining the terms and conditions of engagement), as opposed to doing from an academic or government perspective.

Stakeholder interviews during this assessment confirmed the notion that FIM is well understood and appreciated by those who have attended FIM events, or who have followed FIM over the years.

²⁹ 'Democratising global governance: Ten years of lessons and reflections by civil society activists'.

³⁰ A sherpa is the personal representative of a head of state of government who prepares an international summit like the annual G8.

³¹ 'Critical mass: The Emergence of Global Civil Society', Edited by James W. St. G. Walker and Andrew S. Thompson, Wilfrid Laurier University Press, March 2008.

³² FIM's case study methodology: Report on pilot year, H. MacKenzie, PhD, January 2008

While there is a sound understanding and appreciation of FIM roles and outputs among those directly involved in FIM or FIM events (Board members, former Board members, contributors etc.), external stakeholders appear to have more difficulty clearly articulating or pin-pointing FIM's niche or added value (see 4.4). The fact that FIM is poorly understood by 'outsiders', including potential donors, may affect its ability to diversify its funding base. It is therefore critical to ensure that the role and added-value of FIM is better and more clearly explained in all its external communications.

FIM's practitioner case study methodology:

1. FIM Board identifies a theme or occasion for a case study
2. Case study is identified
3. Case study author is identified and provided terms of reference. Peer discussants identified (incl. one FIM Board Member and one academic)
4. Author submit case study abstract to FIM
5. Author write draft case and analysis of lessons learned
6. FIM provides editorial feedback to author
7. FIM Board member reads case and provides verbal feedback
8. Final author's draft forwarded to peer discussants
9. Peer discussants write 1-2 page feedback
10. Discussant responses are forwarded to FIM
11. FIM, together with author finalises case
12. Case study is translated
13. Dissemination (publication, presentation on FIM forum or other FIM event, website posting etc.)

d) Key findings and recommendations (niche and positioning)

Key findings	Recommendations
FIM mission and vision: FIM's mission statement was revised reflecting the 2006 evaluation recommendations. A vision statement was also approved by the Board in 2008. However, the text still allows for some potential <i>confusion</i> as to the specific role and contribution of FIM, and the language should be <i>more specific and concrete</i>.	Some further work would be recommended to <i>align the vision and mission logically</i>, and to be more <i>specific</i> about FIM's particular role and contribution (see suggestions in section 4.1). In elaborating a strategic plan, with a clear definition of its niche and added-value, it will be important for FIM to <i>consider and weigh all its different functions</i>, and consider where current and future strengths are. Less formalised and visible aspects of FIMs work should be articulated and included, such as its discreet and behind-the-scene diplomacy (with examples from G8 work and Building Bridges), its mobilization potential of Southern civil society leaders in relation to different multilateral processes, and its ability to continue to attract 'leading minds' in the field of citizen-driven multilateralism.
As an NGO, FIM seems to be quite <i>unique in its niche</i>, including in the area of bridging civil society knowledge and academia. However, it needs to argue for and prove <i>why FIM is well placed</i> to take on this role, and what its limitations are.	In connection with the 2009 FIM Forum and Annual Board Meeting in New Delhi it is recommended that FIM spends an additional day or half-day with Board Members in a '<i>strategic retreat</i>' to carry out a <i>moderated niche plotting exercise</i>, and to initiate the editing of the process of developing a strategic plan and a results-framework for the organisation.

Key findings	Recommendations
External stakeholders with no direct institutional link or personal connection to FIM have <i>difficulties in clearly articulating or pin-pointing FIM's niche or added value</i> .	The use of more <i>precise language</i> to describe FIM and what it does needs to be reflected in all information materials and communications about FIM, including on its role and added value.
The fact that FIM is poorly understood by 'outsiders', possibly including potential donors, <i>may affect its ability to attract funding</i> and diversify its funding sources.	With an elaborated strategic plan, such communications can also be more <i>forward looking and strategic</i> in relation to different stakeholders' (or donor) interests.

4.2 Selection of Programmatic Areas of Engagement

The issue of selection of programmatic areas of engagement was grouped together with communications and external relations as it relates to whom FIM is trying to influence, and how.

a) Progress on 2006 evaluation recommendations

- *Developing criteria or guidelines to assist the Board and staff in deciding which ad hoc multilateral groupings FIM will focus on* (Rec. 2); There has been no progress on this recommendation to date as FIM was of the view that some research needed to be undertaken first on the range and characteristics of existing and emerging ad hoc multilateral organisations. However, with many more pressing things to address, this research has not yet been carried out.

The assessment is of the view that the key issue is not so much about *which* ad hoc multilateral organisations or processes to focus on. Rather, guidelines or a checklist is needed to ensure that *any* thematic area that FIM chooses to focus on for a case or for targeted activities is in line with the core mandate and focus of FIM, which is strengthening the interface between civil society and multilateralism in order to: a) broker southern civil society knowledge, b) to raise and document Southern civil society/ citizen voice in relation to multilateral processes, or c) to find cases where clear and applicable lessons can be extracted for use in relation to multilateralism by civil society in the global South.

Selection of thematic areas for cases or projects is done by the FIM Board, and is largely based on discussions at the yearly FIM forum and an implicit common understanding of which issues are relevant and what knowledge is needed. FIM should, however, to be more strategic and 'service oriented' in the choice of topic areas to reflect the CSO information needs in relation to those upcoming or ongoing multilateral processes they want to influence (e.g. through a users' survey). Suggestions for criteria in the selection of topics for upcoming FIM events as well as papers to be commissioned could e.g. include that the targeted practitioner-based knowledge is:

- complementary to ongoing or potential FIM programming,
- of strategic relevance to ongoing or upcoming multilateral processes and debates (rather than being of a more general nature),
- 'in demand' among the FIM constituency, avoiding repetition of the same lessons several times, even if in different contexts,
- based on experiences from civil society in the South, and that lessons are cross-cultural in nature and applicable in the Southern context,
- keeping a clear multilateral focus, as well as on the civil society-multilateral interface.

Without such criteria (to be elaborated by the Secretariat and Board) to be used as a check-list, there is an increased risk of losing focus and being pulled off track by particular interests or 'academically interesting' – but not very practical or applicable – cases.

Choice of theme and cases of the 2009 FIM Forum:

The 2008 FIM Forum seemed to have a high degree of cohesion and timeliness to it, focusing on regional multilateralism and exchanging lessons with FIM's Building Bridges project focusing on the OIC. There was also a clear Southern focus and 'applicability' of the cases and discussions. From an outsider's perspective, this is less noticeable in the 2009 FIM Forum to be held in New Delhi in March.

The theme of the event is: '*Civil society engagement with political processes*'. The cases currently under preparation and to be presented are: (i) 'A study of Nepal's Constituent Assembly Election: The Influence of Civil Society and the Multilateral System,' and (ii) 'Reforming the World Bank: NGOs and the Wolfowitz Resignation'. Compared to the 2008 Forum topics, it is harder (from an outsider's perspective) to see a clear link to the FIM mandate and niche in the Nepal case, which is more country-specific. The applicability of lessons to other contexts also remains to be seen. However, the cases are yet to be produced, and the Wolfowitz case is expected to respond to the growing engagement by civil society to bring about change to the undemocratic and non-transparent manner by which Presidents or CEOs of major multilateral bodies are selected by using the 'whistleblower' approach.

Other strategic or timely areas would e.g. be to look at 'post-Accra' and the role of trans-national civil society in relation to the aid effectiveness agenda. The roles (and responsibility) of civil society in relation to the aid effectiveness agenda was not talked about in-depth at the high-level meeting in Accra earlier this year. Nevertheless, it is a topic that will remain a high priority in policy debates in the years to come.

- *Building continuity between FIM's big conferences and its smaller, more strategic events and activities (Rec. 6). Following-up on promising new ideas that emerge during FIM fora and other meetings/events convened by FIM (Rec. 7);* Since the G05, there have been no more large global conferences hosted by FIM. FIM has not had sufficient internal capacity to implement such activities, with the ongoing organisational restructuring, and – as also pointed out in the 2006 evaluation – it may not be in FIM's primary interest to continue with these costly and all-consuming big events (they were instrumental in putting FIM 'on the map', at the beginning). It can also be argued that other organisations are better suited to host such large civil society gatherings, or that FIM should team up with these other organisations, to achieve cost-effectiveness. With CIVICUS having a permanent representative in Montréal over the next three-year period, as the CIVICUS annual meetings will be held here (in collaboration with the Quebec-based *Institut du Nouveau Monde* ³³), there are opportunities to be explored for FIM.

There is always some continuity between the FIM fora and more targeted project activities since, largely, both types of activities deal with the *specialized field of the civil society-multilateralism interface and influence* (regardless of the topic treated or multilateral institution or process in focus). However, in some cases this continuity is more apparent than in others. In 2008, for instance, the topic of the FIM forum was regional multilateralism with cases presented on MERCOSUR and ASEAN. Moreover, Building Bridges Steering Committee members present at the FIM forum could share their experiences and learn lessons from other regional bodies. As a results indicator, one could even revisit this field and try to assess to what extent lessons from one interregional body is applicable (or has been applied) to another, and how participants have used this knowledge in their own work.

However, this strategic cohesion seems to be missing, or is less apparent, in the plans for the 2009 FIM forum, where the topic is 'civil society engagement with political processes'.

There is little dedicated funding or budget flexibility for FIM to follow up on issues emerging during FIM fora, unless there is already multiyear funding dedicated to these issues (like the G8 work or regional multilateralism in the context of the Building Bridges project). For instance, looking at the FIM 2008/09 budget, the means are not there to do any substantive follow-up on the forthcoming Forum debating political processes, with one case from a national context, and one from an isolated corruption case at the World Bank. With such different topics, there would either have to be a 'flexible fund' set up for specific follow up (however, it might be difficult to attract donor funding for such a fund), or specific

³³ A former Programme Officer of FIM interviewed for this assessment is now a staff member of this institute.

fundraising would have to take place around emerging themes after the events for any follow-up studies or papers. Another option would be to facilitate more *learning-oriented feedback* from participants, with one session at each annual FIM Forum dedicated to last year's topics and getting participants' inputs on how lessons have been applied in practice. This could help to identify what types of civil society processes to focus on. Making the topic selection more strategic and forward looking may also help to attract additional funding for follow-up.

- *Test feasibility of co-hosting a FIM forum on gender in the multilateral system, post Beijing + 10* (Rec. 8); This never materialized for a number of reasons, the main ones being the unresponsiveness of the main multilateral in question (UNIFEM), and the fact that the issue was not perceived to generate any substantive lessons for wider use.

Generally speaking, it is also fair to say that the *issue treated* (whether it is gender equality, debt relief or landmines) is and should not be the main reason for selecting one theme or case topic over another. Issues for campaigning are more within the domain of FIM's constituents. While on the one hand being more forward looking in trying to identify what *types of lessons* are in demand in relation to *which issues*, FIM should also be cautious not to duplicate the work of its constituency members.

b) Major learning points

Programmatic areas of engagement have changed and evolved over time, but it is difficult to trace this evolution without an overall (and updated) strategy in place. In relation to the *application to Sida* in 2005, FIM has delivered on all areas (but again, without a clear results framework or analysis of intermediate results in the reporting), except for not implementing the anticipated G08 conference. As the deficit from the GO5 was discovered, and the organisational restructuring was initiated, it became apparent that yet another large conference was not a high priority or even feasible in the foreseeable future (see reference above).

The selection of programmatic areas of engagement is closely related to the niche and positioning of the organisation, and as described in the previous section, FIM still has to develop a strategic plan in this field. Thus, there are no major internal learning points in this respect.

This assessment, however, notes that a shift took place in 2005 in FIM's focus, moving away from a more narrow focus on multilateral institutions and global governance towards '*global democracy*' (which was the theme for G05). In this broadening of focus, regional and national spheres of action were included. This has led to interesting and successful activities such as the Building Bridges project. However, with a broadened overall focus covering multilateralism at both global, regional or even national levels, it is even more important for FIM to clearly articulate its particular contribution in order not to be pulled off track or delve into levels of detail that make it hard to extrapolate lessons from cases and engagement processes. There is also an increased risk for overlapping with other groups and networks covering specific multilateral processes and institutions.³⁴

There are important lessons to learn from the *Building Bridges project*, since its inception in 2005. With Building Bridges FIM has had the opportunity to exercise its core competencies of mobilizing civil society groups from diverse backgrounds and interests around sensitive issues, and using its influence and networks for '*behind-the-scene, discreet diplomacy*', to pry open and enlighten processes around OIC-civil society engagement.

³⁴ For instance, NGOs and networks around the world that are monitoring the International Financial Institutions (IFIs), including the World Bank and IMF, are jointly quite well organised in IFI Watch where both research oriented and advocacy organisations participate.

While FIM has been successful in initiating and developing the *Building Bridges project*, the process needs long-term commitments from CSOs and funders alike for any real change and long-term impact to be noticeable. The project also provides the opportunity to develop practitioner knowledge in an area that is not yet well documented.

FIM's core competencies in the area of *informal diplomacy* could be in high demand in the future with formal multi-stakeholder processes becoming more and more stifled, calling for informal and innovative ways to enhance actor engagement in multilateral processes. The need for innovative approaches in the strengthening of the voice of the global south, is echoed in recent research: "...much more experimentation with different ways of consulting global civil society groups"³⁵. The same research paper notes that "... at present too many global civil society organisations remain biased towards northern agendas, with southern-based civil society groups often lacking the resources to adequately represent themselves in global civil society networks and in other global forums."³⁶

Project summary:

Building Bridges:

Engaging Civil Society from Muslim Countries and Communities with the Multilateral Sphere

Building Bridges was initiated in 2005, in response to the weak voice of Civil Society from the Muslim world in dialogues with multilateral bodies.

The overall objective of *Building Bridges* is to strengthen democratic global governance through the empowerment of Civil Society from the Muslim world. The aim is to support Civil Society from Muslim countries and communities in effectively influencing multilateral policies and projects.

Building Bridges has two priority outcomes: (1) that Civil Society in OIC member countries (Organisation of the Islamic Conference) gain accreditation; and (2) that Civil society from OIC countries and other Muslim communities will: (a) identify two priority entry points to the United Nations and (b) establish formal relations with these bodies.

FIM's role in *Building Bridges* is that of a neutral convener and facilitator, while a Steering Committee comprising core member organisations lead the project and take the strategic decisions.

Since January of 2006, FIM has convened six meetings under the *Building Bridges* project: in Kuala Lumpur, Doha, Amman, Dhaka, Dakar and Islamabad. Over 90 Civil Society actors, from 70 NGOs, in 28 OIC countries have attended these meetings and contributed to the conceptualization of the project. The meetings provide the opportunity for Civil Society in the Muslim world to meet, dialogue and brainstorm as well as define and advance the *Building Bridges* project.

Besides the *Building Bridges* meetings achievements include the establishment of a Project Foundation and the creation and dissemination of knowledge on the OIC and relevant consultative modalities.

Two regional *Building Bridges* offices will be opened in Cairo, Egypt, and Dakar, Senegal, hosted by partners in those locations. The Cairo office will use its proximity to OIC's General Secretary headquarter in Saudi Arabia to monitor and engage with the OIC. The Dakar office will be a pilot 'floating' office for a three-year period, coinciding with Senegal's OIC Presidency.

³⁵ 'Strengthening Global Civil Society', L. Wild, Institute for Public Policy Research (IPPR), UK, 2006.

³⁶ Ibid, p. 9.

c) Key findings and recommendations (programme areas)

Key findings	Recommendations
The <i>selection of thematic areas and focus topics of the FIM fora</i> is done by the Board. There are currently no guidelines or 'tools' to assist the Board in making this decision (e.g. user's survey, briefing paper, or even a results framework in line with an overall FIM strategic plan), apart from the general discussions at the yearly FIM forum.	<i>Guidelines</i> – or a checklist – is needed to ensure that any <i>thematic area</i> FIM chooses to focus on for a case or for targeted activities is in line with the core mandate and focus of FIM, which is to focus on the interface between civil society and multilateralism in order to: a) broker Southern civil society knowledge, b) to raise and document Southern civil society/citizen voice in relation to multilateral processes, or c) to find cases where clear and applicable lessons can be extracted for use in relation to multilateralism by civil society in the global South. <i>Other complementary tools to make topics strategic</i> (and 'fundable') should be considered, such as carrying out a user's survey among the wider FIM constituency on the types of issues and processes they need knowledge about. This would also make the selection process more inclusive.
<i>Follow up on emerging issues</i> at the FIM fora is still limited, and there is no dedicated funding for it. Staff time is still <i>too limited</i> to effectively follow-up on new and emerging issues and ideas.	FIM should <i>encourage maximum cohesion and complementarity</i> between topics treated at the FIM fora and FIM project areas where more thorough and longer-term follow-up is possible. New and <i>emerging issues</i> (or those generating particular interest among participants) should be picked up for moderated email/online discussion fora (e.g. through d-groups, www.dgroups.org) following events. A synthesis of post-forum e-discussions can be presented and discussed at the following year's FIM forum for continuity.
A <i>high degree of learning</i> has taken place in FIM in relation to the Building Bridges project since 2005. It is also an area where FIM has been able to use its core competencies of ' <i>behind-the-scene, discreet diplomacy</i> ' with success.	FIM's core competencies of <i>mobilizing civil society around sensitive issues</i> and using its influence and networks effectively to make in-roads into an area like the OIC could be in high demand in the future. <i>Informal diplomacy</i> in the field of the civil society-multilateral interface is increasingly in demand with formal multi-stakeholder processes becoming more and more stifled and rarely leading to frank and open dialogue between parties. This is an area that FIM should capitalize on in its future work.

4.3 Communications with Stakeholders and Constituency

As briefly noted in the introduction to this chapter, there has been less progress in the area of communication to date due to the major restructuring of FIM following the 2006 evaluation. There is therefore little internal learning to point to. There are, however, a number of lessons and learning points on communication strategy and tools to consider in the next phase stage of FIM's consolidation.

a) Progress on 2006 evaluation recommendations

- *Developing a modest communications plan that includes electronic and other forms of communication, and basic online data collection and surveys on website and document use, users, etc.* (Rec. 9); The 2006 Evaluation found that FIM's communication was 'weak'; that the organisation 'is not as well known as it should be'. It addressed the need for a thorough assessment of FIM's communications needs, and the development of a communication plan, looking in particular at how to reach Southern civil society, concluding that FIM should find ways to 'get the message out'.

There has been progress in terms of FIM's communication approach; a revised and improved website and database was launched in early 2008 which automatically generate statistics on use, and feedback from stakeholders was reportedly positive. In the Progress Report and Annual Work Plan from May

2008, it is stated that the website is user-friendly and that it has the capacity to document use and users. A formal survey to collect constructive comments from stakeholders (users) has also been discussed and planned, but has not yet been carried out because of lack of staff time to dedicate to these issues.

While FIM is successfully communicating results and lessons learned through the publication/ uploading of papers and case studies to its new and improved website, FIM's *overall communication needs and capacity has not yet been assessed*, and there still *lacks an overall communication plan*.

b) Major learning points

As established, it is undoubtedly a challenge to communicate clearly and simply what the purpose of FIM is without having *a clearly articulated mission* in line with the precise contribution and specialisation of FIM. A combination of limited resources and less priority compared to other pressing issues in the demanding change process that the organisation has undergone is presumably why the *lack of an overall communication strategy* has not yet been addressed. FIM, however, realises the importance and urgency of this.

Developing the communication strategy will be developing the tool to broaden the impact of FIM's resources, and make them more available. The strategy should clearly identify what FIM intends to communicate to whom, how, by which means, and with what overall purpose. It should also address the environment in which FIM, and the website enters; what void the organisation fills, or which position it wants to occupy in the arena. As such, the communication strategy is closely tied to an overall strategy for how FIM can and should be working to achieve its mission (see section 4.1).

FIM target group: It is not entirely clear whom FIM represents and targets. There are somewhat diverging perceptions, also within FIM. There is the view (and conscious positioning from the part of the Secretariat) that FIM represents no one; rather, FIM selects those people and organisations considered to be most useful to the mission, engaging only the best in the field from academia and the CSO environment. Others perceive FIM as representing the Southern Civil Society involved in multilateralism and global governance, broadly. Although FIM strictly speaking is not a 'representative body' with members, FIM's position on this issue could be made more clear and up front. In terms of beneficiaries, FIM 'serves' academia, NGOs and CSOs, multilateral institutions as well as research institutions, suggesting a wide target group, although all with a particular interest in global governance, etc. However, there is also the view that the beneficiaries of FIM are *only those people and organisations already involved in FIM and its activities*, suggesting a fairly narrow target group.

Communication tools: Besides the strategic communication related to outcomes from events such as Forums and Conferences as well as informal communication with key stakeholders, which should not be underestimated, the website is the only tool to 'get the message out' and reach constituents, new ones as well as those already involved. The website is the only means by which FIM advertises its activities and disseminates its resources, apart from via project- or conference-specific emailing to participants. As such, the website, and the information provided here, is an important tool in achieving FIM's communications objectives (to be defined in the strategy).

Looking at the *website from an outsider or new user perspective*, however, it is not immediately apparent what the organisation or the website is about and wants to achieve.

Start-page:



To understand what FIM and consequently the website is about, the user must find and read the 'About Us' or 'Vision-Mission' pages, or the Fact Sheet (a 12 page pdf file). The information provided here, however, is esoteric, and excludes people and organisations that are not already familiar with FIM or well versed in the global governance discourse.

Overall, the website gives the impression that it is communicating to *the already 'initiated'*, people and organisations that are familiar with FIM or that take an interest in the particular agenda that FIM is taking on. The name 'Montreal International Forum' does not suggest what the organisation or the site is about, and there is nothing on the site explaining up front the origins and evolution of the organisation (including its name). As mentioned in section 4.1., the language could generally be more precise, e.g. the term 'democratising global governance' is not a self-explanatory objective to the uninitiated, and may indicate a broader (and more vague) agenda than what FIM is actually about. Also, the activities referred to on the site make little sense unless you are already familiar with them or searching specifically for information about them. An illustrative example is the Photo Gallery, which presents a series of pictures, however, they are not accompanied by text explaining where the pictures have been taken or whom they depict.

Participation and interaction on the website: For users that are not yet familiar with Forum International de Montreal, the word 'Forum' can create the impression that the site is an interactive forum for users to network and exchange information; this is not the case. FIM, with its website, appears to only indirectly 'strengthen the interaction between civil society and multilateral institutions', a core objective of the organisation.

For the website to be a *dynamic think-tank*, to actively mobilise the target group and facilitate processes of establishing contacts and possibilities to advocate, a 'moderated community' for interactive knowledge sharing and discussions is the obvious solution; an addition to the website, where users can pose questions, initiate discussions, inform each other about lessons learned, post ads, possibly upload papers, etc. Free-wares such as 'Development through Dialogue', d-groups (www.dgroups.org) would be an option to do this easily and cost-effectively with an interactive link placed on the FIM website. The initiative is especially developed for and targeted at low bandwidth users in the South by a number of international

organisations and donors. Two of the partners who developed d-groups are also Canada-based (Bellanet and IDRC) which should facilitate for ongoing support and feedback for its use and usability for FIM. It would, however, require some staff time to set up and moderate such an online community of practice.

The website could also encourage its users to participate and interact by providing the option to sign up for events, or to automatically receive news about events, and the option to send links to the various pages on the site, for easy distribution of information from the site in their wider networks. FIM could also consider *linking actively and visibly* to other relevant organisations, papers, presentations and reports, and have other organisations link to FIM's website (multilaterals, NGOs, etc.). This would also make it clearer what the FIM added value is in this field compared to its core constituents, through the difference in types of information and issues addressed. Right now, it is only in the Fact-Sheet, on page 10 of 12 that the reader can find the names of FIM's partner-organisations and there are no interactive links.

An obvious (two-way) link, and potential distribution channel for FIM cases, would e.g. be 'Choike: A portal on Southern civil societies' (www.choike.org) which is a portal dedicated to improving the visibility of the work done by NGOs and social movements from the South. This portal is developed and run by one of the 'core constituents' of FIM, the Third World Institute in Uruguay who also hosts Social Watch and whose Coordinator sits on the FIM Board. However, FIM is not featured in their large and quite impressive directory of NGOs from the South with a special category on International and Regional NGOs and networks. Neither does a global search on the site for FIM cases generate any results. A communication needs assessment would be the first step in developing a clear idea of what FIM's target group and the website users need, how they use websites such as FIM's.

Website structure: It is a key principle to web-based communication that it is communicated immediately to the user what the site is about, in non-technical and easily understandable terms. Alternatively, curiosity and the desire to explore is stimulated by more implicit communication, e.g. with visual means.

Even though FIM's 'message' is not simple and its audience would appear to be organisations and people who are already familiar with the agenda, it is important to keep in mind that most users search the Internet on a daily basis and are presented with numerous options for places to find the information they are looking for. Users quickly lose interest, especially when what is immediately presented to them is not clear, or 'catchy' – which of course depends on who the targeted users are; what their conceptual knowledge and understanding is.

Usability: It would make the site more user-friendly if it stated what the purpose of it is, not only what FIM's objectives are as an organisation. The users have to explore the site and find out by themselves that the site is there to serve as a research and knowledge database, and provide information about relevant activities (projects, forums, conferences).

At the base of the start-page, three news-type columns are presented: 'latest news', 'upcoming events', and 'what's new'. As such, the site has three different news-related categories, which is confusing and not especially user-friendly. Further, under 'latest news'; not having had any events to report on between March and October 2008 creates the impression that FIM is not a particularly active organisation, or that the website is infrequently updated. Regarding 'upcoming events', it is not clear why the single project-specific event currently listed is even posted on the website; the link reads "October 2008: Building Bridges – Islamabad – Pakistan, Engaging Civil Society from Muslim Countries and Communities with the Multilateral Sphere". When clicking on the link to the activity the user finds out that the 'upcoming event' is a meeting internal to a project.

The site has three different knowledge-management systems on the site; the search engine, the library, and the case study and papers folder. It is not entirely clear what the difference or link is between these three options. The 'library' is the actual FIM research material library (comprises papers and studies, a

total of 50). The ‘search’ engine made available already on the start-page works well, however, it allows the user only to search by author, category (presentation, paper, case study or report) or year; not by keyword, which would be useful.

It is valuable with detailed and peer reviewed case studies and papers, so that people or organisations looking for information are provided with quality data, that goes into depth with relevant issues; in fact this is a key activity and objective of FIM. However, it would be more user-friendly if the website provided a simple overview of what is made available, systematically summarising the main conclusions from the reports or case studies. The information can appear impenetrable and time-demanding for the users to work with, leaving the users to sort the information themselves, and download the pdf files to find out if indeed they are relevant to their search. Regardless of the level of knowledge and interest of the target group, it is key to web-based communication that key information is briefly communicated before the user is taken to the actual and often lengthy content.

As a general observation, to make the site user-friendlier, letters should be bigger and text should be presented in smaller pieces by using more sub-headings and bullet-points.

Maintenance and monitoring of use: Reportedly, the website has the capacity to document its use and users. However, this data has not routinely been analysed or fed into clear lessons on how to improve the site.

A search on Google using the following set of words: ‘multilateralism global governance civil society’ does not present a link to FIM; not on the first two-three pages of hits. It would be advisable for FIM to look into how it can be found more easily, in searches. That is if FIM and the website wants to ‘attract’ new users; they need to be able to find the site.

It would be advisable for FIM to identify the characteristics of its fairly diverse target group – academics, people and organisations within the multilateral system, civil society organisations, especially in the South – and their use of websites such as FIMs. Knowing the target audience helps to set the right usability and accessibility standards. For instance, FIM might need to consider that some users have slow Internet connections, and cannot easily download pdf files, etc.

c) Views from external stakeholders

External stakeholders: The assessment team identified, made a sample from, and contacted a wide range of Civil Society organisations that can be perceived as FIM’s target group, i.e. civil society groups who have an international/transnational focus, and an interest in multilateral issues (a total of 18 organisations were contacted). Overall, the feedback, however, was limited; the vast majority did not respond despite several emails and follow-up calls (suggesting a low level of interest in the topic and/or a low level of knowledge about FIM), and a few stated that their knowledge of FIM was too limited to be able to provide any valuable input. The feedback received, however, related mainly to FIM’s communication, message and target group.

One CSO contacted stated that it had not heard from or about FIM for the past two years, wondering ‘if FIM had shut down its operations’. This is presumably due to the implementation of the demanding organisational change process; that FIM has had to prioritise internal processes and consequently pay less attention to staying ‘on the radar screen’ within the global governance and CSO environment.

Another CSO contacted pointed out the observation that “FIM is more academically supported”; that FIM communicates primarily academic information to the academic community, adding that “the environment is congested with papers, case studies and reports; what is needed is something that shows how to translate knowledge into action”; that “CSOs often do not have the resources to seek, find, and use documentation – such as what FIM appears to be producing and offering”. This confirms the observation of the study; that FIM should take measures to analyse and understand its target group, and its ‘users’.

‘Internal’ stakeholders: Another group of stakeholders contacted were those with a more immediate connection to the organisation, either as current or former Board Members, as Steering Committee members for the Building Bridges project, or as contributors to studies and in FIM fora. Of those contacted in this group, around half answered, but those who did really took the time to provide long and detailed inputs.

The internal stakeholders, also provided input for how FIM could improve its communication, essentially agreeing with the external stakeholders that “FIM needs to reach out more to a wider range of CSOs”, and that “FIMs role and potential is still not fully understood among many leading civil society networks at the regional level in the developing world”. There is recognition of the challenge for FIM in finding ways to reach and constantly communicate with Southern CSOs beyond events such as the Fora and Conferences. It is also recognised, however, that this would require more dedicated communications and networking staff.

A concrete suggestion for how to ‘get more known’, and enhance the FIM profile, was increase the number of collaborations with other groups and carry out more joint work, e.g. with key research centres.

d) Key findings and recommendations (communications)

Key findings	Recommendations
FIM's <i>strategic communication approach</i> is weak; it is unclear who FIM (and the website) is targeting with its communications, and the ‘message’ is poorly communicated.	FIM should identify <i>what it intends to communicate to whom, how, by which means, and with what overall purpose</i> . As part of this process, FIM should analyse the different target groups (or key stakeholder groups of relevance to FIM) and their different need for and use of information.
FIM's <i>website is not interactive</i> , despite aiming to strengthen interaction and be a setting for the expression of a plurality of views, participatory dialogue, reflection, and active learning	FIM should consider adding an <i>interactive forum to the website</i> and generally encourage users to participate actively
The website communication is ‘ <i>heavy</i> ’ and <i>esoteric</i> to new users	FIM should <i>lighten</i> its communication on the website, and provide summaries of the case studies and papers to make it more user-friendly
Interactions with the <i>media</i> have been low-key and ad hoc with no policy statement to guide future interactions	FIM should develop a <i>policy statement to guide relations with the media</i> in a systematic fashion. FIM could choose a fairly low-key media profile for itself, while still playing an intermediary role in terms of brokering contacts and knowledge from the South related to multilateralism.

5. Findings at Sida-FIM Partnership Level

The TORs for this assignment states that, in addition to the two primary objectives (i.e. to assess the implementation of 2006 evaluation recommendations, and the overall organisational structure of FIM), the assessment should “...serve as a learning tool for FIM and SEKA EO (Sida NGO Division), and as an instrument for Sida’s overall support to international organisations”. The assessment coincides with Sida’s own internal review and mapping of support to international organisations under this allocation envelope.

Future opportunities for a more strategic Sida-FIM partnership have been assessed, with concrete suggestions for a tool that can be used for discussion and planning.

Key questions are: (i) how does FIM fit into the new draft Sida strategy for cooperation with international NGOs?, (ii) what is the mutual added value of the partnership?, (iii) can there be more strategic cooperation on some selected issues (like in the case of the Sida-supported Building Bridges project), in addition to general institutional support?, (iv) Can continued institutional support be justified, and how can it be more results oriented in the future?

5.1 Progress on Implementation of the 2006 Evaluation Recommendations

- *Engage with funders about acceptable measurement of results/which indicators will be used for reporting* (Rec. 10); The need for FIM to be monitoring and reporting on intermediate results against a more strategic results framework has been referred to above (see section 3.2). A discussion should be held with Sida to agree on when and how reporting will take place, which indicators to focus on,³⁷ and which result areas are of greater interest to Sida. In drawing up this results framework, interests of other related Sida departments – such as the department dealing with multilateral development cooperation or the Middle East and North Africa (MENA) geographical desk for potential links to Building Bridges – should be considered.

A wide interpretation of results is needed in this field of work where few activities or project areas produce measurable results, and where those that do (such as number of participants at FIM events) are not in themselves very informative. Other types of evidence to prove influence on certain groups of actors or processes (stories, qualitative user's surveys etc.) will be important. FIM's own institutional development should also contain certain benchmarks against which progress can be assessed on a regular basis.

- *Ensure that funders' expectations regarding reports are known, and that reports are submitted on time* (Rec. 19); Setting a clear results framework for the cooperation up front, as described above, will greatly help to clarify reporting requirements and needs – both for accountability purposes, and to establish a more strategic and mutually beneficial partnership. FIM has made considerable progress in this area since the Research and Development Coordinator came onboard.

5.2 FIM in the Context of Sida's Allocation for International Organisations

The overall objective of Sida's support to international NGOs is: *"to promote a vibrant and democratic civil society that improves the possibilities for poor people to improve their living conditions"*, with the specific objectives to: (i) provide access to important knowledge and competence for Sida and the Swedish NGO framework organisations, and (ii) provide support to international processes where the role of civil society organisations in the development agenda is in focus.

Currently, there are around 14 Swedish framework NGOs and 8 international organisations that receive funding via Sida's NGO division. The financial support for the international NGOs falls within Sida's so-called 'allocation to popular movements' – a separate allocation to that of Swedish framework NGOs. Due to increasing competition in the field of international think tanks and NGOs active on transnational issues, demands on Sida's NGO division have increased. This has created the need for a clearly articulated policy and guidelines on the use of this particular financial envelope.³⁸

³⁷ FIM will have to draw up its own results framework and indicators that make sense institutionally. However, a dialogue with Sida will determine *which of these* will be of most strategic relevance to Sida.

³⁸ Internal Sida draft paper on support to INGOs, international processes and initiatives within Sida's so-called 'allocation to popular movements'. Sida-SEKA, E. Lejdemyr, August 2008.

a) The Sida-FIM partnership

Origins

Initially, Sida provided some limited financial support for FIM's G05 conference, which one Sida advisor also attended. Following this event, FIM submitted its first three-year application for the period the period 2006–end 2008 with one part for institutional support (core funding), and one part particularly targeted at developing the Building Bridges project.

The assessment memo in 2006 refers to the fact that Sida and FIM have not only had a funding relationship in the past, but also an "...intellectual exchange from which both institutions have benefitted."³⁹ Sida also specifically highlighted its interest in supporting civil society actors from the Muslim world in the memo.

Characteristics of the partnership

A feature of the Sida-FIM collaboration seems to be that it is based largely on personal relations rather than on a more institutional approach to using and anchoring the partnership more broadly within Sida. This is noticeable in the way the partnership was initiated, and by the fact that it is still managed and maintained exclusively within the Sida civil society division without any clear links to the department for multilateral cooperation or the geographical desk for Middle East and North Africa (MENA). An encouraging first step to change this was made, however, when FIM presented to a gathering of Swedish NGO partners in Alexandria in September this year.

Sida could potentially benefit more from the partnership if such linkages with relevant Embassies and departments within Sida could be reinforced during the next programming phase.

In the 2006–08 programme period, Sida was one of two institutions providing core funding. This was of great importance to FIM during a difficult reorganisation period, and served as a 'lifeline' in between specific FIM events. At the same time, it created a certain dependency on Sida which FIM will have to address during the next programming period.

A considerable success of the partnership during the current programme (2006–2008) is the Building Bridges project. From a donor's perspective, it has opened up a new area of collaboration with civil society from the Muslim world, and has allowed FIM to make – at least initial – contacts with Swedish Embassy personnel and NGOs in the MENA region as referred to above.⁴⁰ This ongoing work, and the in-roads the Building Bridges project has made with the OIC over this short period of time is encouraging, but will need a long-term perspective and financial support to make real progress.

Future directions

Given the increasing results orientation of Sida, it is strongly advised that its partnerships with international organisations (including FIM) are *more strategically assessed and agreed*, and that Sida (and/or the Ministry of Foreign Affairs) makes better 'use' of these strategic partnerships to record results, to provide useful information and to help holding institutions accountable⁴¹. Some suggestions for how to do this in the Sida-FIM partnership are listed below:

- a) establishing a results framework with FIM that can feed into, or inform, the strategic objectives of *other Sida departments*, like the department dealing with multilateral development and/or the geographical MENA region *as well as* the Sida NGO division,

³⁹ Sida Assessment Memorandum, 2006-02-07

⁴⁰ FIM's CEO recently made a presentation on the Building Bridges project and the OIC at a meeting hosted by the Swedish Embassy in Alexandria, end September 2008.

⁴¹ Be it national governments or multilateral institutions.

- b) enhancing *internal learning* from lessons on the civil society-multilateral interface within Sida and with Swedish NGO framework organisations by using *FIM practitioner cases as teaching cases* on courses and seminars of the Sida Civil Society Centre (SCSC),
- c) connecting, when appropriate, FIM to SAREC on *research-oriented topics* related to civil society and multilateralism, and (if/when possible) encourage joint research in areas of relevance to FIM (this recommendation could be extended to Swedish academia more broadly),
- d) making better use of *FIM's mobilization capacity* among top civil society leaders from the South, and its core competencies in the field of *informal diplomacy* to organise informal dialogue opportunities between Swedish officials and Southern civil society leaders on issues of policy interest (such as e.g. the civil society interface with the aid effectiveness agenda 'post-Accra')⁴²,

FIM's mobilization capacity of Southern civil society leaders in relation to informal policy dialogue and 'informal diplomacy' holds a lot of potential, using the lessons that FIM has gained from its G8 work, with the OIC etc. FIM's core competence in this field needs to be written down and explained more clearly, with some terms and conditions stated, such as: (i) that civil society representatives participate in their own personal capacity, not as representatives of larger networks and constituencies, (ii) the fact that the agenda is discussed and jointly agreed upon between parties, and when desirable, (iii) that the Chatham House rule⁴³ is applied to all such informal dialogue, i.e. that participants are free to use the information received, but that 'neither the identity, nor the affiliation by the speaker(s), nor that of any other participant, may be released'.⁴⁴

b) Profile and fit of FIM in Swedish development cooperation and Sida's 'international NGO portfolio'

Looking at Sweden's strategy for multilateral development cooperation (2007), Sida's policy for support to civil society (2007), and the Sida NGO division's internal draft paper on support to INGOs, there is overall a good fit between FIM and Swedish interests.

Sweden's strategy for multilateral cooperation

At present, more than half of Sweden's development cooperation is channeled through the multilateral system, primarily various UN bodies, the World Bank and other development banks, vertical funds (global initiatives), and the EU. In several organisations, Sweden is among the major donors.⁴⁵ A top priority laid out in Sweden's *strategy for multilateral development cooperation* is to make these institutions as effective and accountable as possible to enhance their developmental impact. The strategy focuses on how Sida influences, selects and channels funds effectively through multilateral institutions and processes; *the role of civil society is not at all mentioned in this strategy*. Even so, there are certainly converging points of interest between what the strategy sets out to do and FIM's area of expertise.

... "So , as we are all – UN, NGOs, and CSOs – in the business of making this a better world for all humanity, we just need to get on with that job, one step at a time. And when the UN and civil society make the step together, so much the better!"

*Observations provided to FIM by Cyril Ritchie in the paper:
"UN-Civil Society Relationships. Where are we Going?", September 2008*

⁴² When discussed with the FIM secretariat, this was an area they would be very keen to explore further.

⁴³ For further information, see: <http://www.chathamhouse.org.uk/about/chathamhouserule>

⁴⁴ The Chatham House rule is increasingly being used by think tanks and research foundations involved in facilitating frank and open dialogue involving civil society around specific policy processes. Lessons can be learned e.g. from the European Centre for Development Policy Management (ECDPM) in its efforts to feed civil society views into EC deliberations about Economic Partnership Agreements (EPAs), see <http://www.ecdpm.org>

⁴⁵ Sweden's Strategy for Multilateral Development Cooperation, Ministry of Foreign Affairs, Government of Sweden, April 2007.

Sida's policy on support to civil society

The *policy on Sida's support to civil society*⁴⁶ talks about four different ways to financially support organisations: (i) as *implementing agencies* to carry out an assignment of importance to Sida, (ii) to strengthen an *organisation's capacity to perform* as a democratic actor in society (through institutional support), (iii) to strengthen the role of civil society as an *arena for citizens' engagement*, and (iv) through support for an *enabling environment* for civil society to take action. It also stresses the need for strengthening a 'pluralistic civil society'.

Sida's continued support to FIM could fit into all of these categories: (i) by undertaking more targeted learning activities or dialogue on issues of relevance to Sida, (ii) by consolidating its organisational base so that FIM can more effectively fulfill its mandate, (iii) by developing the dialogue interfacing, its informal diplomacy competence, and its outreach to constituency members through improved communications and interactivity between forum events, and (iv) by actively engaging in and feeding civil society voice into the aid effectiveness agenda. Building Bridges is furthermore a good example of encouraging a more pluralistic approach to civil society support.

The Sida NGO division's review of its support to international NGOs (INGOs)

Finally, looking at the Sida NGO division's (Sida SEKA) internal review of its support to international organisations (its 'INGO portfolio'), a mapping of the eight current recipients⁴⁷ of financial support under the so-called 'allocation to popular movements' was completed in-house. The following characteristics can be noted about FIM:

- The financial allocation to FIM is among the smallest in this financial envelope,⁴⁸ (FIM is also among the smaller organisations)
- Besides the "resource organisations" that provide training, FIM is the only non-advocacy oriented organisation,
- FIM differ to the others in its methodology and approach in that it focuses exclusively on the civil society-multilateral interface through knowledge creation, knowledge brokering, facilitation of dialogue processes and documentation and publication of cases of best practice,
- FIM is the only organisation specifically targeting civil society in the Muslim world and its interface with the OIC.

The draft paper concludes that future support to INGOs should be categorised and selected based on its main 'function':

- 1 *A support function* to Swedish NGOs (mainly framework organisations), the Sida civil society team and other departments in Sida. This would specifically aim at encouraging Swedish framework organisations and its local partners to cooperate more with international networks at a global level. Services under the 'support function' would be financed through targeted support or through competitive bidding (i.e. buying services rather than giving core funding).
- 2 The function of *effectively contributing* to the goals of the Sida civil society strategy for international organisations that operate at a global level specifically to: a) promote cross-border civil society advocacy for issues related to civil society development, and b) strengthen civil society engagement – and especially the role of Southern based CSOs – in international and regional processes.

⁴⁶ Sida's Support to Civil Society in Development Cooperation, Sida, May 16, 2007

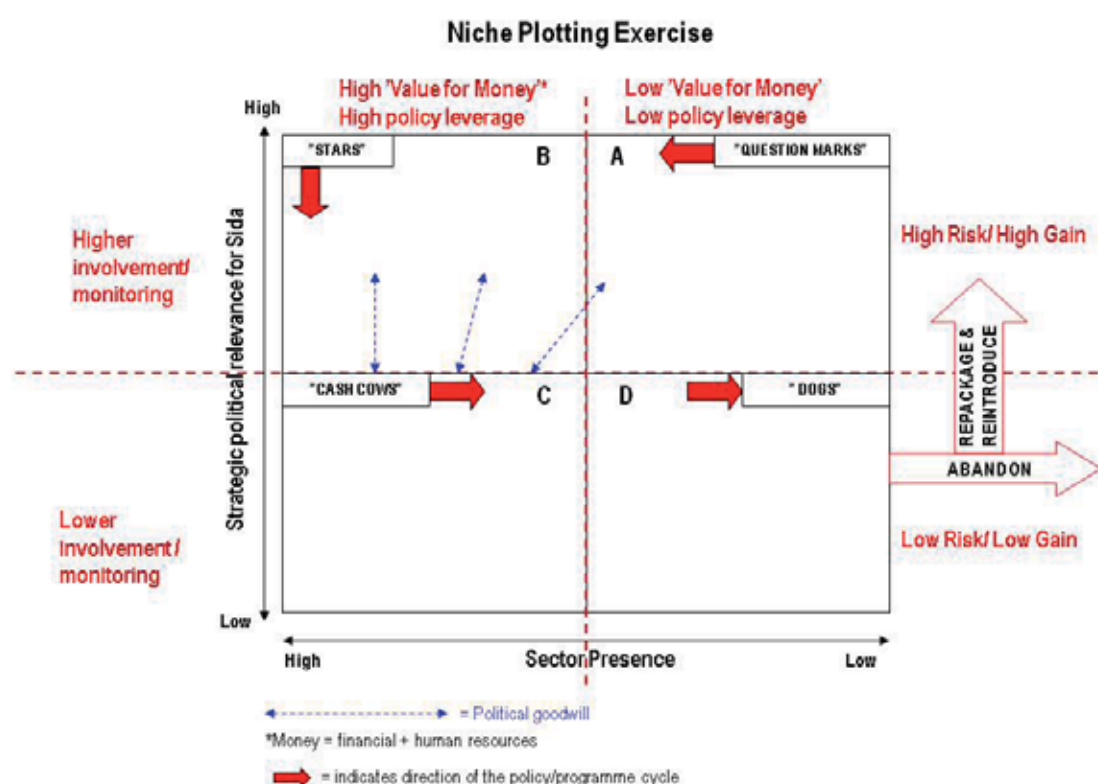
⁴⁷ These are: CIVICUS, World Social Forum, FIM, INTRAC, CORAT, CDRA, IBON and Civil Society Invitation.

⁴⁸ FIM's allocation was SEK 2.7 million over a 3 year period, compared to e.g. CIVICUS with an allocation of SEK 9.5 million over three years time.

Based on the characteristics and evolving role of the Sida-FIM partnership, FIM could fit into both of these functions and roles. Continued institutional support (with a clear results framework and ‘phasing out’ plan attached) would allow FIM to effectively contribute to the Sida civil society strategy, to develop and further institutionalize the Building Bridges project, and to broker Southern based knowledge and participation in multilateral processes. However, the partnership could be made more *strategic*, *results-oriented* and *relevant* by complementing this core support with more targeted inputs and ‘services’ to build capacities within Sida, Swedish NGO framework organisations, and/or to facilitate more specific informal dialogue opportunities between Southern civil society and Sida or Ministry officials.

c) Niche plotting exercise for the Sida-FIM partnership

In assessing what *aspects* of FIM’s operations are most relevant to Sida’s own political priorities, a niche plotting exercise was carried out for FIM’s main ‘products’ – the global conferences (G05), the Building Bridges project and the FIM forum. This niche plotting tool was directly adapted from the Boston matrix⁴⁹ for use in the development sector context (C. Örnemark, 2007), and was again adapted to the context of Sida’s ‘INGO portfolio’ in this assignment. Far from being an exact science, the exercise seeks to visualize support patterns based on strategic relevance as a basis for discussion and reflection (see matrix below).



Since a bigger plotting exercise – covering all partners and areas of support under the Sida INGO envelope – fell outside the scope of this assignment, the focus was kept on different types of activities within FIM. However, it would also be possible to look at FIM as a whole, plotted alongside all other INGOs receiving Sida support. Used with Sida planners in mind, the matrix plots FIM activities against ‘sector presence’ (referring to Sida’s presence through its financial support to the sector of global governance/global civil society/global democracy) on the lower axis and ‘strategic political relevance for Sida’ on the left-hand axis.

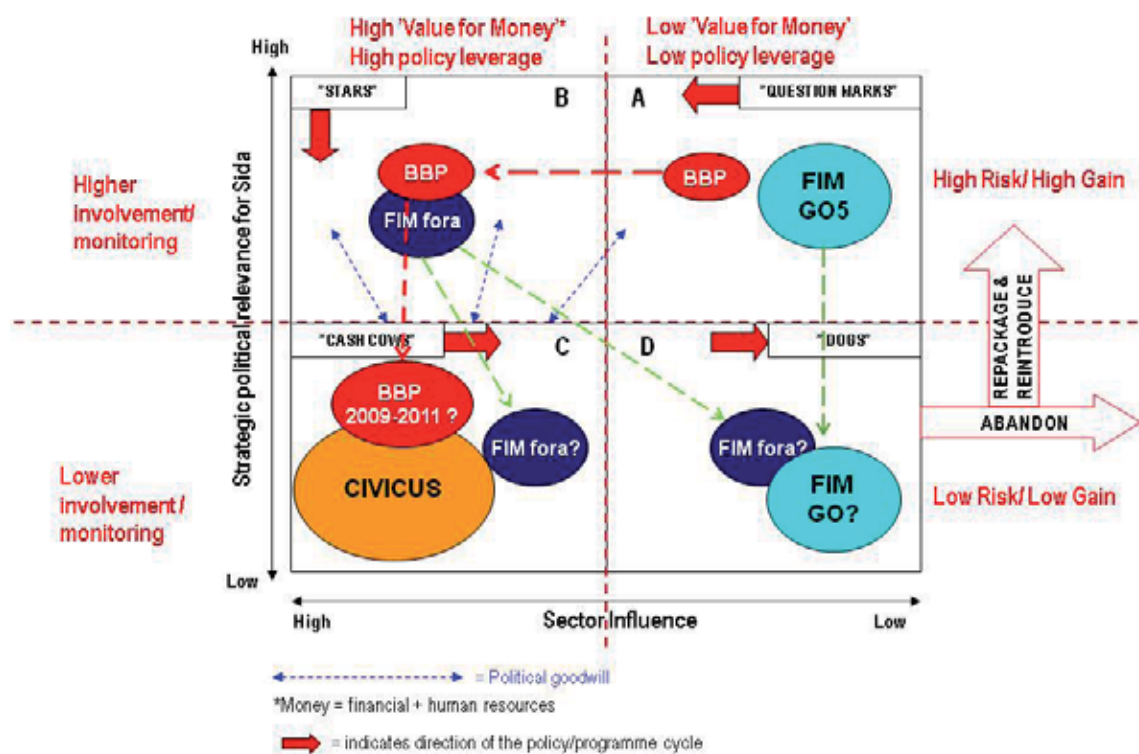
⁴⁹ The Boston matrix was initially developed for the business sector to assist firms in planning their product portfolio by contrasting relative market share to market growth.

The underlying logic is that financial project support usually follows a cycle of being introduced in the upper right corner, in the category of 'question marks'. It may be, like in the Sida-FIM partnership, for a one-off event (G05), or in the case of Building Bridges, the initial conference in Kuala Lumpur. If successful (as in the case of Building Bridges), this project would move into the 'star' category. Projects or partner programmes in this category are seen to be high value-for money, they have a high strategic political relevance for Sida, and they provide a sense of 'leadership' /high level of sector presence (just like there are few donors to date with any institutional knowledge of, or insights into the OIC in the case of Building Bridges). However, since interventions are still fairly small or 'young' in this category, they can also be seen as relatively high maintenance in terms of day-to-day involvement, diplomacy and ongoing monitoring.

As more donors are gradually attracted to a 'star' intervention area, however, budgets grow, the project or initiative 'matures' and creates its own governance systems (e.g. Building Bridges project is just about to open a Cairo office and a Senegal focal point). It then moves from the 'star' category to the 'cash cow' box. In the business world, the 'cash cow' products are the ones that give enough profit so that new and 'riskier' investments can take place, for example in innovations or product development. Similarly, in the development sector, the 'cash cow' projects or programmes are of low risk and generate political goodwill for the donor that 'spills over' to other segments.

In the case of the Sida INGO portfolio, for instance, giving relatively large funding support to a well-established and representative civil society network like CIVICUS (which can be considered as low-risk investment that establishes Sida firmly as a partner in the global civil society arena), it can use smaller amounts of funding to invest in 'riskier', less established or more innovative but less representative and inclusive organisations like FIM to achieve a balanced 'INGO portfolio'.

Niche Plotting Exercise - example



Finally, as political agendas, global priorities, and foreign policies shift, some of the projects or partners may have outlived their strategic relevance for Sida and consequently move to the bottom right corner of the matrix – the ‘dogs’ category. Projects, programmes or ‘partner products’ that linger in this category are no longer cost-effective or politically relevant for Sida. For projects or programmes in the ‘dogs’ category, Sida has two options: either the project is repackaged (i.e. made more strategic and relevant) and reintroduced as a new question mark, thus commencing a new programme cycle, or the project/partner should simply be abandoned and funding ceased.

Looking at some of the FIM ‘products’ that has received Sida support since 2006, the following picture emerge as one possible interpretation of the partnership (the CIVICUS support is plotted just as a point of reference for illustration purposes):

Interpretation of the niche plotting graph (above):

- 1 Sida started cooperation with FIM around the *G05 conference*. However, due to FIM overspending on the conference, which brought on a deficit, along with other factors of financial management capacity, the planned G08 described in the Sida project proposal of October 2005 never materialized. The one-off Sida investment led to many positive outcomes, however, (such as a long-term institutional partnership with FIM, the Building Bridges project, ‘intellectual exchange’ between Sida and FIM that was mutually stimulating and beneficial etc.). But as a ‘product’ the G05 went straight from the ‘question mark’ category to the ‘dogs’ category. As FIM also realizes, any future conferences on this scale would either have to be done differently, in partnership with others (thus ‘repackaged and reintroduced’) or be abandoned until further notice.
- 2 The *Building Bridges project (BBP)*, as described above, was introduced as a ‘question mark’, took off, started to develop its own institutional mechanisms, developed into a large community of interest in a relatively short period of time (from a relatively small group to now covering 90 civil society actors, from 70 NGOs, in 28 OIC countries), but where FIM will still need to play an intermediary and facilitative role for a long time still to come. From the ‘star’ category where it can currently be placed, it is likely to ‘mature’ into an initiative that can attract its own resources and diversify funding sources in the relatively near future (putting it safely into the ‘cash cow’ category). However, it deals with a very sensitive area of civil society in Muslim countries and a multilateral institution – the OIC – which is traditionally considered to be both inaccessible and non-transparent. FIM has done a detailed risk analysis and mitigation plan in connection to the project. However, any of these potential risks could of course put the whole initiative into the ‘dogs’ category if not predicted and avoided.
- 3 The yearly *FIM forum* is the signature event of the organisation, which gathers between 30–50 civil society leaders and academics to discuss cases of practice (two cases of academic standard is prepared for each year’s forum) and to exchange experiences. The themes of these fora, as well as the topics of the cases prepared, vary depending on civil society priorities. FIM Secretariat staff members consider this its ‘star’ product which gives credibility and continuity to underpin the rest of the work. Looking at it from Sida’s perspective, however, the strategic importance of the fora and cases vary from year to year, some being more topical and strategic than others. By making topic selection criteria more transparent and inclusive, one could of course argue that any theme is strategic as long as it is prioritized by civil society actors themselves (see recommendations to this effect in section 4.2). But without a sharpened strategic focus or transparent criteria for topic selection, the FIM fora would probably be sliding towards the ‘dogs’ category for Sida, whereas FIM would want to see it developed as their ‘cash cow’ event from which other smaller and innovative initiatives could take off.

FIM is also active in some other areas, such as developing an institutional link to academia, the G8 etc. However at this point in time, both of these areas are yet to be further defined, which is why they were left out of the niche plotting exercise.

5.3 Key Findings and Recommendations (Sida-FIM partnership)

Key findings	Recommendations
The selection process for identifying FIM as a Sida partner, as well as the ongoing contacts between Sida and FIM are largely <i>personal in nature, and limited</i> to the NGO division. A more institutional anchoring to fully use FIM's strategic advantage would be desirable.	<i>Related Sida departments</i> other than the NGO division (e.g. the division for multilateral development assistance, or MENA) should be consulted when a new Sida-FIM cooperation framework is drawn up, in order to identify potential cross-departmental benefits and more strategic use of FIM outputs and results.
It is difficult to identify <i>specific results from general core funding</i> , even if continued institutional support will be essential for FIM's organisational consolidation over the next programme period.	A wide interpretation of results is needed in this area of work, and evidence should be sought to prove and <i>track graduated progress</i> in FIM's influence on certain groups of actors (e.g. constituent CSOs) or processes (rather than focusing reporting on a list of outputs). FIM's <i>institutional consolidation</i> and development should be seen as one of the important result areas to 'justify' core funding, with specific benchmarks agreed upon between FIM and Sida.
The practitioner-based cases of academic standard, produced annually for the FIM fora, are not necessarily used for learning or discussion within Sida.	Explore ways to <i>increase internal learning from lessons</i> on the civil society-multilateral interface within Sida and with Swedish NGO framework organizations by using FIM practitioner cases as teaching cases on courses and seminars of the Sida Civil Society Centre (SCSC). Another way would be to <i>organise informal dialogue opportunities</i> between Southern civil society leaders and the relevant departments in Sida (multilateral division, MENA...).
FIM's <i>mobilization capacity of Southern civil society leaders for informal dialogue</i> and inputs into specific policy processes are not fully taken advantage of in the current cooperation between Sida and FIM.	The area of <i>informal dialogue, informal diplomacy, and increased exchange</i> between Southern civil society leaders and officials holds a lot of potential, building on FIM's lessons from work around the G8 and OIC. FIM should <i>explore using this niche advantage</i> , describe and put down some conditions on paper, and make it a more <i>prominent part of the FIM 'portfolio'</i> of activities and outputs.
Overall there is a <i>good fit</i> between Swedish strategies and interests and FIM.	Continued <i>institutional support</i> for a period of time will be needed, complemented by <i>measures to make the partnership more strategic</i> .

6. Overall Conclusions

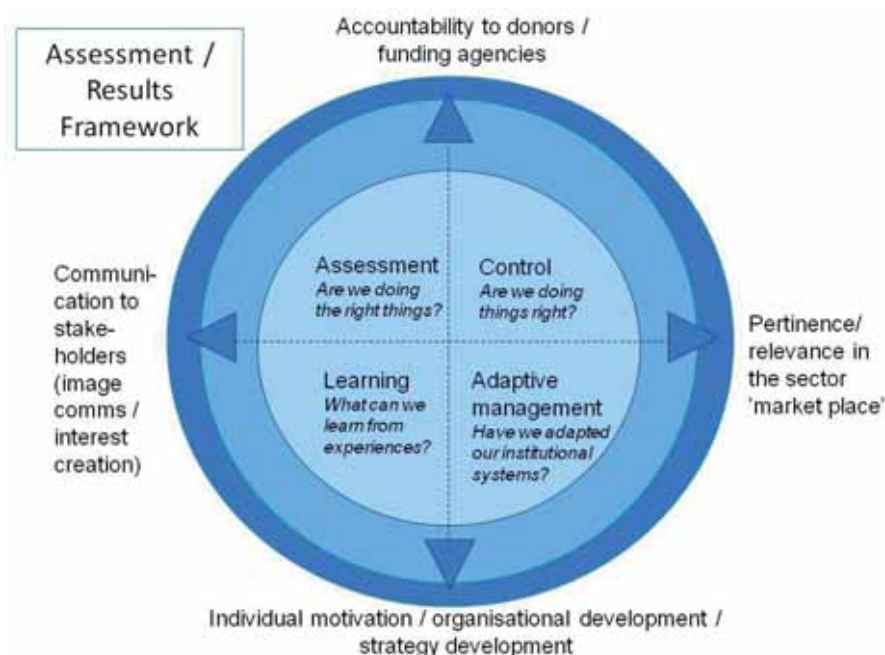
The below framework (see graph) was proposed in the inception note for this assignment⁵⁰ as a means of carrying out the analysis of (i) FIM's progress in implementing evaluation recommendations since 2006, and (ii) the overall adequacy of the organisational structure and format of FIM in relation to its stipulated objectives.

The overall conclusions are depicted in the graph below, indicating overall good progress in the areas of control ('are we doing things right?') and adaptive management ('have we adapted our institutional systems accordingly?') – i.e. the two fields at the right hand side of the figure that were the main focus during the organisational restructuring. As noted, this restructuring has come a long way, and after a couple of painful years, the organisational foundations are in many ways stronger now than before.

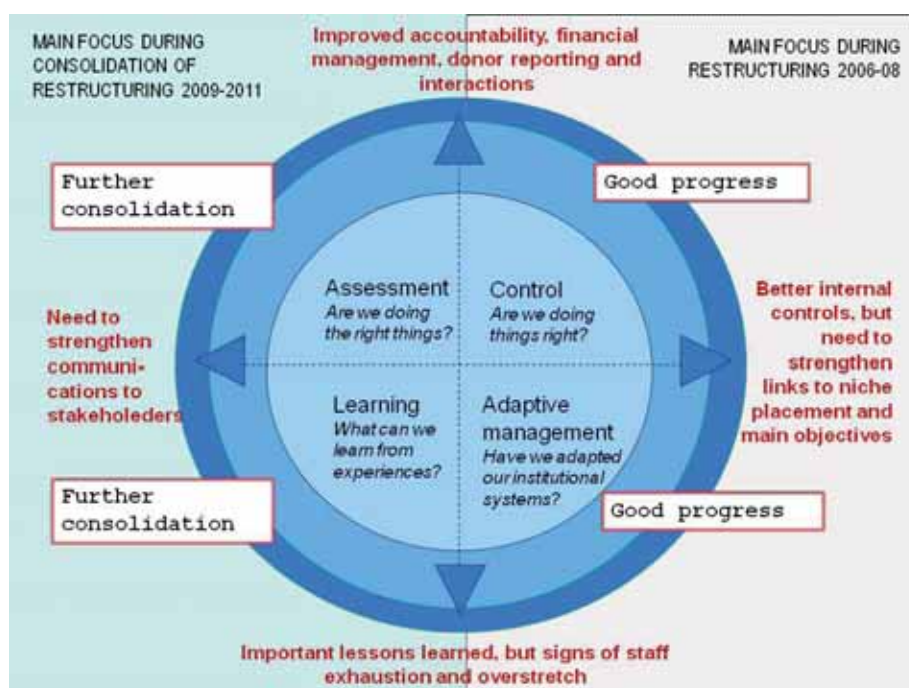
The mere fact that FIM has survived this transformation, while still having been able to deliver on programme objectives, shows a high level of adaptability, learning and commitment of its staff and

⁵⁰ Inception Report, Assessment of Forum International de Montréal (FIM), C. Örnemark, L. Friberg Nielsen, 15 September 2008.

immediate stakeholders. This high level of commitment also came across strongly during interviews with Secretariat staff and Board Members during the assessment, and is in itself evidence of FIM's credibility and legitimacy in the sector.



However, many mechanisms and processes that lead to consolidation of these recent changes as well as further organisational development of FIM still remain to be addressed. The good progress noted in the areas on the right hand side of the assessment chart below (related to controls and adaptive management) now needs to be reflected and reinforced by more attention to internal learning, strategic positioning, results-oriented monitoring and clearer articulation of core competencies (see left hand side of the assessment chart). Any donor interested in financially supporting FIM would have to be willing to also provide some investment in these areas in order for FIM to fully take advantage of its unique niche and potential contribution in the coming years.



List of Annexes

Annex I: Terms of Reference

Annex II: Profiles of consultants

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Annex IV: Sample questionnaires to ‘internal’ and ‘external’ stakeholders

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Annex I: Terms of Reference

Terms of Reference for Assessment of Forum International de Montréal (FIM)

1 Background

A considerable part of Swedish development cooperation is channelled through Non-Governmental Organisations (NGOs). At present the Division for cooperation with NGOs (SEKA EO) within the Swedish International Development Cooperation Agency (Sida), contributes funds to Swedish organisations and their cooperation partners in over hundred countries worldwide. During the last years, disbursements from Sida to Swedish NGOs for development cooperation have annually exceeded 1,200,000,000 SEK.

In order to streamline the administration and assessment procedures for project proposals, Sida has introduced a system of Framework Agreements with the Swedish NGOs, at the moment this entails fourteen organisations. Beside this system, Sida supports a number of International organisations. This support relates to the same overall objective: *to promote a vibrant and democratic civil society that improves the possibilities for poor people to improve their living conditions* and is undertaken in order to complement and develop the support to the framework organisations. The specific objectives with this support are:

- Access to important knowledge and competence for Sida and the framework organisations
- Support to international processes where the role of civil society organisations in the development agenda is in focus.

According to Sida's assessment memorandum, 2006-02-07 treating the proposal from FIM for the period of 2006–2008, an external evaluation should be carried out in 2008 building on the management response from the last evaluation, initiated by Oxfam Novib and carried out during 2005/2006. The realisation of the 2008 evaluation is said to be a condition for further commitments for funding. The principal conclusion of the previous report was that *FIM enter a concerted period of financial and organisational consolidation. Programming cannot stop during this period, but FIM should give priority attention to ensure the health of the "base" from which its programming is done.*

According to the evaluator, FIM's biggest problems were linked to the structure and management of its finances and to its institutional capacity to sustain what it does long-term while the recommendations concerning programmes and orientation were directing at minor changes.

In all, 20 recommendations concerning Mission, Programme, Monitoring, Governance and Operations, were given. FIM has reported on their follow-up on the recommendations and verifies that a radical restructuring process has taken place, including a debt recovery plan.

2 Purpose and Scope of the Assessment

Main objectives of the assessment:

- To assess the level of implementation of the recommendations i.e. the progress of implementation of the action plan
- To assess the adequacy of the organisational structure and format in relation to the stipulated objectives of FIM.

The scope of this assignment is threefold:

- 1) assess the achievements of FIM regarding the *implementation of the recommendations of the evaluation in 2006*, with particular focus on the financial aspects
- 2) assess the *adequacy and relevance of the organisational structure* and format of FIM in relation to its mission and objectives.
- 3) The FIM programs are heavily relying on communication at different levels. This includes the communication of results and learning from case studies, strategic communication to mobilise and facilitate processes of establishing contacts and possibilities to advocate. Communication skills are crucial and FIM has identified this as an issue to evaluate. The assessment should study the *capacity and competence* of FIM to implement the communication aspects of their programs.

Moreover, the evaluation should serve as a learning tool for FIM and SEKA EO, as well as an instrument for Sida's overall support to international organisations. It should suggest improvements for FIM concerning improvements in the areas above.

3. The Assignment

The assessment should address the following questions:

a) What is the level of compliance with the action plan deriving from the recommendations of the evaluation "Consolidating the Gains" from 2006?

Assessment of how FIM is proceeding in finding a stable financial basis for their core activities and programmes.

Assessment on an overall level of the recommendations concerning programme, monitoring, governance and operations.

b) What is the level of adequacy of the FIM organisational structure and format in relation to its mission and its objectives?

Assessment of the organisational setup:

- office – volume, capacity and competencies
- board – composition, role and level of involvement

c) What is the level of capacity and competence within the field of communication?

Assessment of the communication strategy of FIM and the implementation of it.

4. Methodology, Qualifications of Team and Time Schedule

The assessment has been commissioned by Sida, the Division for cooperation with NGOs, (SEKA EO). A representative from SEKA EO as well as from FIM will be of access to the Consultant throughout the process. The programme officer at Sida responsible for the evaluation is Helena Bådagård.

4.1 Assessment process

The Consultant shall evaluate relevant background documentation that will be provided by FIM or Sida. The evaluation of FIM by Jean Christie, Feb 2006 and the following reports on the implementation of the recommendations and any other studies of relevance for the assignment should be used as background material.

4.2 Method

The analysis is expected to include a study of relevant documentation. Interviews will be done with relevant stakeholders in Sweden and in Montreal.

4.3 The Consultant

The Consultant assigned to carry out the evaluation will be called off from the “Framework agreement for Consulting Services in relation to Civil Society” with the regard to services of evaluations/developments of methods, March 2007.

The Consultant should seek to use a participatory approach. The Consultant should have thorough experience of Swedish and international development cooperation including civil society and communication issues as well as documented experience of conducting evaluations.

The consultant/team should include:

- management and organisational skills
- experience in capacity development of civil society organisations
- knowledge on the international debate on civil society
- knowledge and experience on communication for development

4.4 Time Schedule

The time needed for the assignment should be calculated in the call-off proposal and include, time required to prepare the inception report, time for completing the report and a presentation of the draft conclusions with FIM and at least two meetings at Sida.

5. Reporting and Timing

The evaluation shall be started no later than the 2008-09-08. An inception report shall be presented no later than 2008-09-15 which Sida should approve within ten days. A *draft* of the full report shall be presented to Sida's NGO Division for consideration, not later than 2008-10-31. Sida and SCS will comment the draft report within fifteen working days, after which the Consultant shall prepare the *final report* within ten working days.

The findings and draft conclusions and recommendations will be presented to FIM in a seminar at the end of the visit of the consultant to Montréal. When the draft report has been submitted the consultant will present the report to Sida, Stockholm.

The report shall include a presentation of the process in drawing up the evaluation design and choosing methodology. It shall also list all contributors to the evaluation.

The final report shall not exceed 20 pages excluding Annexes and be submitted electronically to Sida.

The report shall be written in English. The final report must be presented in a way that enables publication without further editing, which includes professionally proof read. The format and outline of the report shall therefore follow, as closely as is feasible, the guidelines in Sida Evaluation Manual – a Standardised Format. The evaluation shall be written in programme Word 6.0 or later version. Subject to decision by Sida, the report might be published in the series *Sida Evaluation*.

6. Other

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

7. Specification of Requirements

Sida will, after evaluating the call-off proposals using the criteria specified below, decide upon which call-off proposal is most suited for the assignment. Sida will then make a decision and sign the call-off orders under the “Framework agreement for Consulting Services in Relation to Civil Society” with the regard to services of evaluations/developments of methods, March 2007.

- The call-off proposal shall present the following information: How and when the assignment is to be done;
- The working methods employed in order to complete the assignment and secure the quality of the completed work;
- 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);
- A proposal for time and working schedules according to the Assignment
- The consultant should be able to sign the call-off order no later than the 20082008- 09-08

Annex II: Profiles of Consultants

Charlotte Örnemark

Senior consultant and team leader

Institutional analysis, organisational learning, monitoring and evaluation

Associate Partner, Nordic Consulting Group

Tel: 0046 76 11 57 463

Email: charlotteornemark@telia.com, cor@ncg.dk

Qualifications for the assignment: Charlotte Örnemark has 15 years of work experience in institutional analysis, strategy and operational programme development, organisational learning, social audits and communications, with a strong focus on results-based management (RBM) and aid effectiveness.

She has experience of work with global civil society representation and voice in multilateral aid processes and has worked inside and with the UN (Unicef, UNDP, Swedish Permanent Representation to the UN, New York). Moreover, she facilitated civil society involvement and policy inputs in EC development cooperation with the African Caribbean and Pacific (ACP) as enshrined in the Cotonou Agreement (including Economic Partnership Agreements), and the monitoring and analysis of international financial institutions (IFIs) including the facilitation of formal dialogue opportunities and documenting of civil society and donor experiences in a number of countries. Particular focus of this work was to promote informed civil society engagement in relation to the annual World Bank and IMF meetings, and to provide Southern organisations with first hand reporting from within the meetings.

She combines her qualifications in communications with evidence-based approaches to programme management and evaluation. Work in this area has included the design of tailored solutions to enhance results-oriented and evaluative thinking and practices in organisations, partnerships and programmes, using a number of participatory and formative approaches. Communications experience also covers network management, facilitation of multi-stakeholder processes, setting up and facilitating formal and informal engagement structures for influencing policy, public advocacy and outreach, evidence-based communications and writing for the media, as well as civic education and opinion-building in the field of democracy and human rights.

She has extensive experience in the governance sector with a focus on institutional engagement mechanisms between State and non-state actors (civil society and the private sector) and social movement building.

She has carried out consultancy assignments for the European Union, bilateral donor agencies and Ministries of Foreign Affairs, UN agencies, independent research foundations such as the European Centre for Development Policy Management (ECDPM), non-governmental organisations and as a freelance journalist.

Line Friberg-Nielsen

Consultant, Young Professionals Programme of Nordic Consulting Group

Email: lfn@ncg.dk

Qualifications for the assignment: Line Friberg Nielsen is one of NCG's Young Professionals; a social scientist and international consultant. Ms. Friberg Nielsen has held professional positions with development consulting companies as well as NGOs, and worked in the field, short- and medium-term. She has strong analytical and communication skills, and is an experienced coordinator and project manager.

Thematically, Ms. Friberg Nielsen has worked with development communication (i.e. developing advocacy strategies and information material, assessing behavior change communication strategies for health promotion, etc.), organisational capacity development, civil society support, good governance, and public sector reform. Key areas of expertise include qualitative data-collection, -processing and -synthesis, programme formulation and monitoring, performance audit, management review, and evaluation.

Annex III: Approach and Methodology

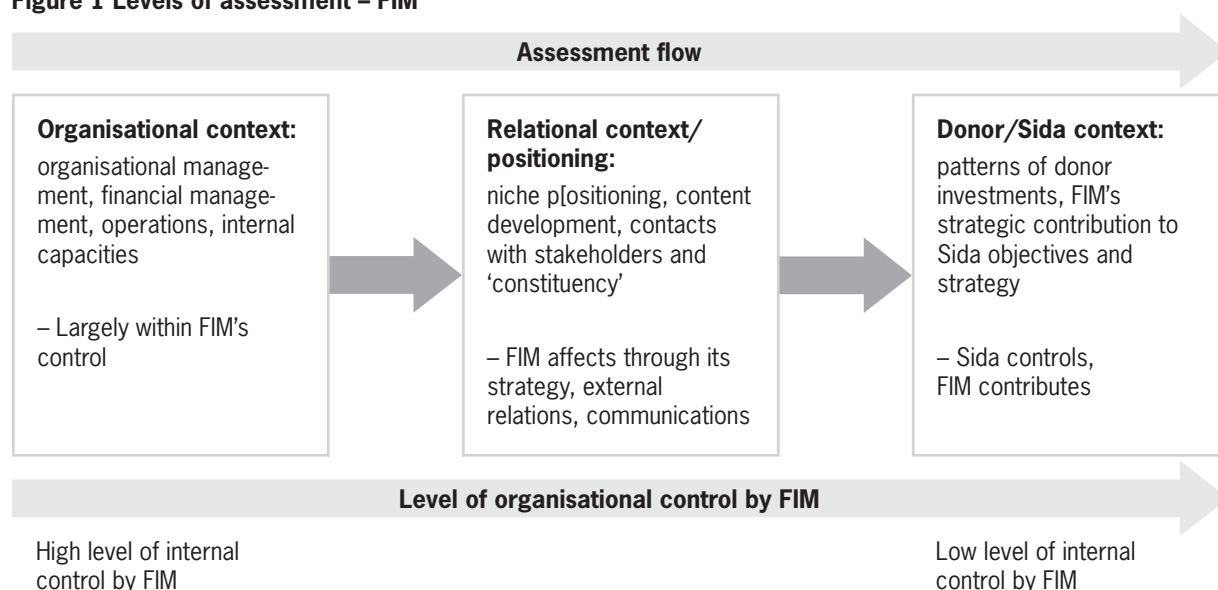
A Systems Approach

In order to cover the scope and evaluation questions detailed in the TORs (see Annex 3), the assessment will adopt a systems approach. The term refers to an understanding of organisations as *complex adaptive systems*, functioning primarily on the basis of interrelationships between people, groups, structures and ideas⁵¹. The resulting patterns of interaction drive behaviour, events and outcomes. We will distinguish between three main levels of assessment:

- 1 The *internal organisational and operating environment* of FIM, with emphasis on internal structures, financial management, capacities, values and work processes.
- 2 At an intermediate level, how FIM relates to the rest of the world, i.e. *FIM within its system of partners, stakeholders and external context*. Here communication strategies, knowledge management approaches, selection of intervention areas, facilitation and convening mechanisms will be the main focus.
- 3 Finally, once internal mechanisms and strategic niche placement has been explored, the third level will look at how FIM fits strategically with and contributes to *Sida's overall objective and strategy* for support to international civil society organisations.

The assessment flow between the different levels, as well as FIM's level of control for each is presented graphically below:

Figure 1 Levels of assessment – FIM



The 20 evaluation recommendations in the 2006 evaluation report⁵², which will serve as a reference point and baseline for the assessment, spans across these different levels as they are grouped around mission and niche, programme content and orientation, programme monitoring, governance, and operations. However, the assessment will not be limited to these previous recommendations. Rather, new and emerging issues will also be noted in order to, at an aggregate level, discuss the adequacy of the FIM organisational structure and format in relation to its mission and its objectives.

⁵¹ Capacity, Change and Performance, ECDPM, 2008

⁵² 'Consolidating the Gains: A strategic evaluation of the Forum International de Montréal', J. Christie, Feb. 2008

An 'Actors-perspective' based on Outcome Mapping pPrinciples

It is important to note that the focus of this assessment is of FIM as an organisation, not of results and impact of all its programmes and activities. In other words, the assessment looks primarily at the *outcomes of organisational change* since the last evaluation, along with prospects for future partnership.

Assessing FIM's progress in implementing evaluation findings will cover the formal aspects of what actions have been undertaken and processes initiated to date. But it will also include another dimension of actors-oriented analysis to determine how changes have been internalised among individuals, or groups of people that are central to the organisations' performance (staff, partners, Board Members, stakeholders). Key questions relate to how patterns of interactions within FIM and between FIM and its stakeholders have been affected, and how they in turn influence the institutional framework and performance of FIM (see also Methods section below)⁵³.

As such, the approach and methodology is based on the principles of *Outcome Mapping* by putting changes among people, and in relationships by groups of people, at the heart of organisational learning and transformation. It also lays the foundation for applying a more actor-specific methodology to the planning and monitoring of programmes in the future.

Learning Orientation

The assessment methodology⁵⁴ has been devised to have a strong learning component, both for FIM and for Sida in order to make it a meaningful exercise for both parties. The methodology will also take into consideration the fact that the assessment should serve as '*... an instrument for Sida's overall support to international organisations*' (TORs). It will differ from a more traditional/technocratic M&E approach, as detailed in the table below.

Traditional M&E approaches	Learning oriented evaluations
Tend to look narrowly at specific project deliverables	Takes account of the value of new or changed relationships
Look at specific outputs and outcomes as predefined in a logical framework	Includes process outcomes that emerge
Analytical framework tends to look at the organisational performance of institutionalised aspects only	The analytical framework tends to apply more of a systems approach to capture overall network performance and experience
Outputs and outcomes are fairly predictable	Assumes that organisations and networks are fluid and their trajectories not easily predictable, nor are their exact outputs and outcomes
Achievements may be overlooked by using a biased set of assessment indicators and assumptions.	Captures unforeseen achievements and spin-off actions by adopting a systems approach to M&E

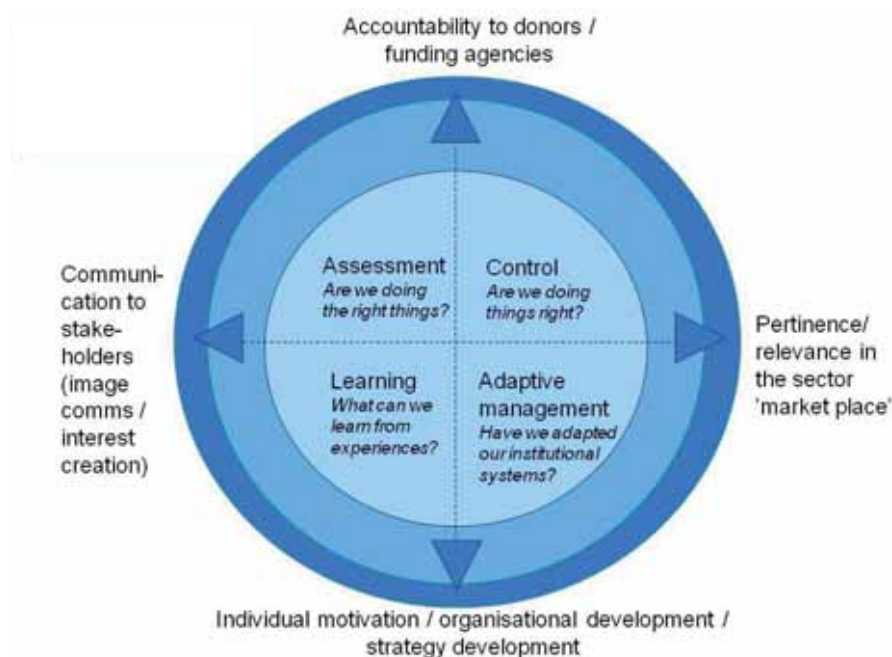
Source: C. Örnemark, P. Engel, N. Keijzer, 'Responding to change: Learning to adapt in development cooperation', Policy Management Brief, March 2007 (ECDPM, Maastricht)

Preliminary findings will be framed and discussed with relevant parties (FIM staff, Sida and if available – partners and stakeholders) according to the different core functions of the assessment as described in the below figure.

⁵³ Organisational learning theory distinguishes between single-, double and triple-loop learning, reflecting the degree to which underlying rules, values, norms and behaviour are truly affected.

⁵⁴ As per the Proposal for Assessment of Forum International de Montréal (FIM), Nordic Consulting Group, 18 August 2008

Figure 1: Assessment framework (Örnermark C., 2008)



It introduces the concept of multiple levels of accountability of FIM: to its *donors and funding agencies*, of which Sida is one, but also to FIM's other partner groups such as *global civil society* and other beneficiaries/stakeholders, to its own *staff and Board*, and to its *strategic partners* in order to stay relevant in its niche and 'market place'.

For Sida and other funding agencies, questions of particular relevance are related to *assessment and control*, i.e. are things done right within FIM (good management of operations, especially in relation to financial management), and is FIM focusing on the right things in relation to its own mandate and in relation to the Sida support? For other stakeholders and 'beneficiaries' within global civil society, key questions relate to *processes of communication* and *learning from experiences*. This is particularly important given the nature of the organisation as a facilitative and 'convening space' for civil society organisations involved in multilateral processes. As noted in the evaluation (J. Christie, 2006), learning should be central in FIM's role as 'neutral convenor' as it is based on the experiences from other stakeholders and processes, rather than on its own advocacy and value judgements. With this in mind, evidence-gathering and communication processes become critical for continued reflection and feedback, particularly together with its Southern civil society partners as a means to increase inclusiveness in the processes they follow.

However, learning also needs to take place and be institutionalised *within the organisation*, among staff and the Board. Key questions in this regard relate to how the organisation captures learning internally, and how management systems are continuously adapted to reflect this learning. This is closely linked to the strategy development, which in turn determines the pertinence of the organisation in its niche and market place.

Methods and Tools

The assessment will use a combination of methods and tools to address the three main levels of assessment (i.e. FIM internal operations; communications and positioning within its operating context; and relevance for Sida objectives and civil society strategy).

An overview is described in the following table, and is explained in further detail below.

Assessment area	Methods	Tools
Level 1: Organisational management and finances Implementation of relevant evaluation findings Identification of emerging issues Organisational learning and existing capacities to move on	Literature review Institutional audit (on-site) Interviews with staff and Board Members Internal brainstorming workshop with staff (and stakeholders if available) around initial findings	Assessment Matrix, part I and II Assessment framework graph to guide internal 'brainstorming' on preliminary findings
Level 2: FIM interaction with external audiences, communication and sector/ niche positioning Implementation of relevant evaluation findings Identification of emerging issues related to programmes and communications, niche and mandate Changes in relations and communications with external audiences	Literature review, with emphasis on their communications tools and channels (publications, website) Actors analysis to identify key stakeholder groups and FIM 'constituency' Analysis of communications strategy (if available) and other knowledge management tools Analysis of FIM niche in the area of 'global civil society'	Assessment Matrix, part I and II Review checklist for communication tools, channels, and audiences Short online/phone questionnaire to stakeholders (Southern CS, others active within the 'global civil society' sector, officials)
Level 3: Strategic donor investment and contribution to Sida civil society strategy Implementation of relevant evaluation findings Identification of emerging issues in relation to the FIM-Sida partnership based on findings from level 1 and level 2	Mapping of donor patterns and interests (past and current FIM funding) Analysis of Sida objectives and strategy for support to international civil society organisations Analysis of potential areas of mutual strategic interest to Sida and FIM Suggestions for forms of cooperation	Assessment Matrix, part I and II Matrix of donor patterns and potential for future financial sustainability Niche plotting exercise of FIM in relation to Sida portfolio of support to international civil society organisations

Assessment Matrix of Actions and Learning

The first objective of the assessment described in the TORs is *'to assess the level of implementation of the recommendations i.e. the progress of implementation of the action plan from the 2006 evaluation'*. In order to achieve this, an Assessment Matrix (see Annex 4) will be filled out to:

- 1 Document evidence of actions and measures undertaken by FIM to address and implement evaluation findings and note some new emerging issues and questions arising from this exercise,
- 2 Capture learning and more intangible changes in relationships, work processes and core values of FIM as a result of organisational transformation.

The Assessment Matrix will be filled out in two parts. It has regrouped the evaluation findings into the three levels described above, i.e.:

Level 1: Findings related to *organisational management* processes and operations (financial management, programme monitoring, capacities),

Level 2: Findings related to *FIM interaction and communication* within its operating environment and programme content development, and

Level 3: Findings related to *strategic donor investment* in FIM and its contribution to Sida's civil society strategy.

The *first part* of the matrix will seek to record:

- 1 *FIM actions:* What has FIM done to date to address and implement findings?,
- 2 *Sources of evidence:* Where in the documentation and/or interviews is this (change/progress) supported?, and
- 3 *Emerging issues:* What needs follow-up or further investigation? Initial comments and remarks will be noted.

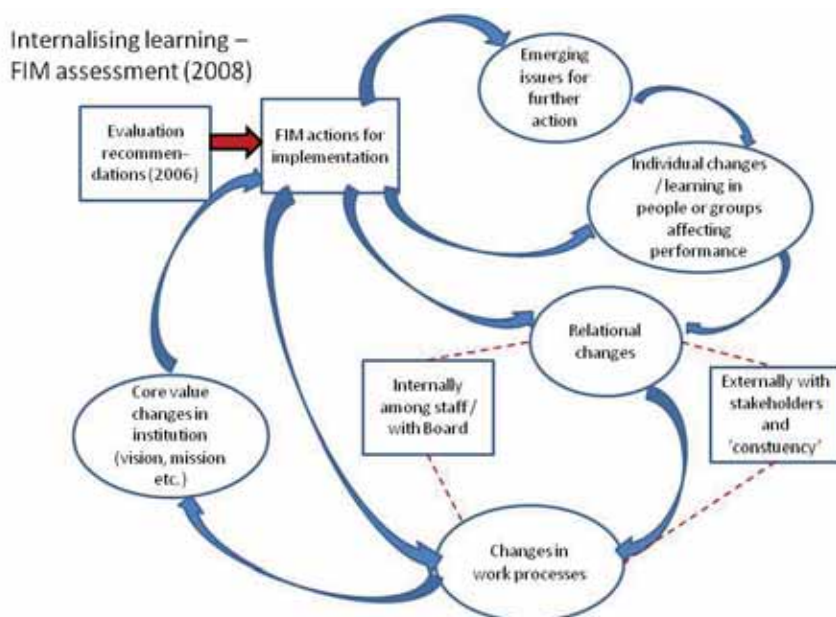
The main method for acquiring this information is through a *review of existing literature*, received from Sida and FIM. The purpose is to track all the 'formal' and recorded actions and steps undertaken by the organisation to implement findings from the 2006 evaluation, and to assess what has been resolved and what is still outstanding. During this process, an important purpose is also to note other emerging issues that should be part of follow-up interviews with FIM Secretariat staff in Montréal or in phone/email interactions with Board members and stakeholders.

This first part of the matrix only records formal actions as reported by FIM, or which can be detected in the existing literature. To what extent changes have in actual fact taken place in a way that has had a positive effect on the operations of the organisation is difficult to see from the literature alone. It will only be possible to assess during the on-site visit and during discussions with staff and stakeholders, which will validate evidence noted in the matrix during the literature review.

A draft version of the Assessment Matrix (part 1) and literature sources used to date is included in Annex 4. This will be expanded when more literature, also from FIM's internal records, have been reviewed.⁵⁵

The *second part* of the matrix will complement the first part on formal aspects of change with *informal and intangible* aspects of organisational change. It will try to detect whether changes have been internalised and are embedded in learning, and how such learning influences staff and work processes in day-to-day operations. Here, it is important to note that *not all* actions need to lead to extensive organisational learning. Depending on the nature of the recommendation, some corrective measures may have been executed without any further need for change or learning. However, in relation to the more profound suggested changes to do with structure, institutional capacities, mission and vision, it will be relevant to try to estimate the degree to which it has been internalised as a result of learning.

The proposed framework for this part of the assessment is schematically presented the below graph:



⁵⁵ Background literature from FIM will be received on 15 September, and collected during the on-site visit in Montréal 24 Sep–1 Oct.

As the graph tries to illustrate, learning and intangible aspects of organisational change is by definition more chaotic with unclear relationships between cause and effect. Nevertheless, the assessment will seek to capture information on these different aspects of internal learning and change in the second part of the matrix. This, in turn, will provide an information base for the second main objective of the assessment: *‘to assess the adequacy of the organisational structure and format in relation to the stipulated objectives of FIM’*.

Information will rely on discussions and interviews with staff, stakeholders, and partners (as and if available within the limited time available). Issues emerging in this context will be validated through email and/or phone interactions with a selection of Board Members, stakeholders (Southern civil society organisations) and other actors within the ‘global civil society’ arena.

This part of the assessment will focus on the areas where change has been recorded in the first part of the matrix, and try – where and if applicable – to capture some of the more intangible aspects such as:

- 1 *Individual changes*: How have changes and organisational restructuring from implementing the 2006 evaluation findings affected individuals or groups of staff/Board Members/stakeholders and partners – e.g. through learning or staff development, new or different roles and tasks etc.?
- 2 *Relational changes*: How have relationships internally or with stakeholders changed?
- 3 *Work processes*: How are things done differently as a result of change or organisational transformation?
- 4 *Core value changes*: How have institutional core values been affected? (This will be most relevant in relation to the implementation of recommendations to changes in FIM’s vision and mission statements, but could also be linked e.g. to attitudes towards ways of sourcing and handling finances from donors).

Interviews with Staff and External Actors

On-site interviews with FIM staff will take place during five working days 23–30th September. The structure will largely follow the format of the Assessment Matrix with a focus on emerging issues. Special emphasis will be on financial management and communications as per the TORs. Given the situation of FIM with a very small core staff at the secretariat⁵⁶, but with a large ‘convening mandate’, it will be even more important to involve and contact also some of their collaborators (researchers, facilitators), partners and stakeholders to get a complete picture of how the organisation has evolved, especially during its restructuring since 2006.

An *actor analysis* will precede interviews with external groups. This will aim at clearly identifying the different categories of stakeholders with whom FIM regularly interacts and with whom some degree of influence can be expected.⁵⁷ These groups can either be at the immediate periphery of the organisational structure (such as Board Members, network members), and/or outside the organisation (such as the wider community of Southern civil society organisations, researchers, officials, etc.).

A sample of people within each main stakeholder (or ‘constituency’) group will be contacted via email and/or phone with a few questions tailored to their role and interest in FIM. Consultations will mainly aim at validating some of the preliminary findings. If possible, within the limited time available, a few totally external actors in the area of ‘global civil society’ will also be contacted for their brief feedback

⁵⁶ Currently there are only two full time staff members in the organisation, from 3 full-time permanent staff and 2 full-time contractual staff in 2005.

⁵⁷ In Outcome Mapping this is referred to as ‘boundary partners’ i.e. those individuals, groups, and organisations with whom the program interacts directly to effect change and with whom the programme can anticipate some opportunities for influence.

to get a better understanding of FIM's reputation and recognition in relation to multilateral processes such as e.g. the G8.

Workshops & Meetings

Scope and key issues for the assessment stipulated in the TORs were discussed with Sida during an initial meeting on 12 September. Another meeting between Sida and the consultancy team to discuss findings will take place on 24 October, before submitting the draft report at the end of October. Finalisation of the assessment report is scheduled for early November.

A workshop with FIM staff will be held in Montréal to present draft conclusions of the assessment. This will be done towards the end of the senior consultant and team leader's visit in Montréal (30 Sep). The purpose of this workshop will be to discuss the preliminary findings of the assessment and to obtain input from staff on key issues examined. It will also look at preliminary recommendations and follow-up actions that FIM commits to in relation to its partnership with Sida.

Annex IV: Sample Questionnaires to 'Internal' and 'External' Stakeholders

The term 'internal' stakeholders refers to those with an immediate link to FIM through the Board (current or former Board Members), or as contributors to various FIM events. 'External' stakeholders refers to those CSOs contacted who were seen as within FIM's potential constituency, who are active within the area of multilateralism, but who do not have any institutional ties with FIM.

Questionnaire to 'Internal' Stakeholders: Board Members/Former Board Members and Other Key Stakeholders

Please note that all answers are anonymous. Although direct quotes may be used in the final report, it will not be attributed to you personally without your consent. Each question below contains a number of probes. Please answer as applicable and where relevant to your views and experiences. Kindly return this form with your answers incorporated, no later than *15 October 2008* to (charlotteornemark@telia.com, and/or lfn@ncg.dk). Thank you for your time and cooperation.

1 How would you describe your role and involvement in FIM to date?

- How did you first get involved in FIM and its activities?
- Has your role changed over time?
- Could you make a rough estimate of the average time you spend per year on (or in preparation for) FIM activities and events?

2 What do you consider to be the niche and added value of the organisation?

- Why is it important?
- Has this (FIM niche/added value) evolved over time (especially since the reorganisation in 2006)?
- How would you describe the role of FIM in relation to multilateral processes and civil society currently?
- What do you think should be the role of FIM in the future (and what would be needed for it to be realized)?
- Do you think this niche and added value is well understood by others (donors/funding agencies, Southern/Northern civil society, academics etc.)?

3 How would you describe the FIM 'constituency'?

- Who would you say are the main 'beneficiaries' of FIM activities?
- What do you think is the ideal role and role division between the Board/Secretariat in relation to the wider constituency?
- Who are some other important stakeholder groups to whom FIM should be known?

4 What do you think are the main short- and long term challenges for FIM?

- Any personal reflections on how to address them?
- Are any of these challenges linked to the recent streamlining of operations and re-organisation of the Secretariat (since 2006), if so which ones?

5 The current CEO and President, Nigel Martin, has announced to the Board that he would be stepping down as CEO in the near future. How do you think this will practically affect the organisation as a whole/ your particular role/the FIM network/ongoing activities and funding levels?

6 What do you think about the current balance between FIM 'core activities' (yearly FIM forum, two documented cases/year) and more targeted ongoing programmes (Building Bridges, G8 etc.)?

- Are these two aspects of FIM complementary to each other? If so, how? Or how could they be?
- Are there, in your view, other possible strategic roles or areas of intervention for FIM that are currently underexplored?

7 How important is it to you that FIM has a clear Southern focus and Board composition, and why?

- How is it currently reflected in its role and activities? How can/should it be preserved?
- How does it translate into the focus of activities and FIM fora?

8 Do you feel that you receive sufficient information and communication about:

- FIM organisational matters (secretariat, selection of staff, financial management, fundraising)
- plans and activities
- issues for discussion and debate at FIM events
- ongoing interactive discussions with others in the FIM network

9 Which ones of the below FIM communications channels and tools do you find most useful and why? (Please explain). Do you think they differ from those used by FIM's broader constituency?

- Annual Board meeting
- Regular Board Member updates from the CEO
- Website
- Practitioner-based (commissioned) cases/academic papers
- Interactive discussion platform/ moderated email lists
- Regular
- Comment:

10 If you would have to describe FIM in one sentence or 'slogan', what would it be?

Questionnaire to 'Global Civil Society Actors' (5 Questions)

Please note that all answers are anonymous. Although direct quotes may be used in the final report, it will not be attributed to you personally without your consent. Please return to: charlotteornemark@telia.com. Thank you for your time and cooperation.

- 1 Do you know about/have you heard about Forum International de Montréal (FIM)? If so, in what context?
- 2 Do you consider them to be a relevant 'player' in the global civil society arena? If so, in what role (e.g. as a space for reflection, knowledge-broker, convener, mechanism to strengthen the voice of Southern civil society in multilateral processes, other roles)?

- 3 FIM describes as its mission:
'FIM believes that transparent and democratically accountable multilateralism offers the best hope for Global Governance. In order to best meet this challenge FIM endeavours to strengthen the influence of the voice of Southern civil society within civil society in all debates and activities affecting global governance.'

Would you agree that this is a relevant mission? Is the 'niche' already filled by other organisations or does/could FIM have an added value?

- 4 Which multilateral processes do you think need more external convening and reflection to mobilize civil society, especially those from the South?
- 5 FIM uses case studies of best global civil society practice as a way of documenting and spreading knowledge about successful civil society influence on multilateral processes (e.g. around the G8, the anti-landmines campaign, Jubilee 2000). All cases go through a peer review process to be of academic quality and standards, to be used in teaching (e.g. in global studies courses) and to be disseminated to civil society activists, especially in the South. Are you aware of their publications, or, if not – do you think there is need to have this type of 'practitioner based' knowledge disseminated and published? Do you think this is a good approach to spreading knowledge and mobilizing civil society actors on global governance issues?

Annex V: List of Contributing People/Organisations

FIM Secretariat:

Nigel Martin – CEO and President of FIM

Heather MacKenzie – Research and Development Coordinator

Caroline Alcaraz – Administrator

Christian Major – Volunteer

Danielle Dame – External Auditor

Aude Lecointe – Former Programme Officer in FIM (until 2006)

Other Donors:

Dave Murphy – Montréal International

FIM Internal Stakeholders:

Dr. Rajesh Tandon – current Chair of the FIM Board

Dr. Jim Riker – current Board Member

Mrs. Meena Kadhimi – current FIM Board Member

Ms. Muthoni Lynn Wanyeki – current FIM Board Member

Mr. Cyril Ritchie – participant at several FIM fora

External Stakeholders:

Mr. Sergi Rovira – Ubuntu – World Forum of Civil Society Network

Mrs. Maud Johansson – Head of Global Development Unit, Forum Syd HQ

Mr. Alex Wilks – EURODAD

Mr. Fraser Reilly-King – Halifax Initiative

Annex VI: List of Documents Consulted

- Assessment Memo, Assessment of the Sida contribution to FIM – Forum International de Montreal 2006–2008
- Building Bridges: Engaging Civil Society from Muslim Countries and Communities with the Multilateral Sphere, Programme 2008–2011 ('Annex 11')
- Christie, Jean, Consolidating the Gains – A Strategic Evaluation of the Forum international de Montréal, February 2006
- Espino, Alma, Impacting MERCOSUR's Gender Policies: Experiences, Lessons Learned, and the Ongoing Work of Civil Society in Latin America, presented at the FIM Forum 2008 ('Annex 2')
- FIM 2006–2008, Sida Annual Progress Report and Work Plan, May 2008
- FIM Board Meeting Minutes, March 2007
- FIM Board Meeting Minutes, Montreal, Quebec, February 2008
- FIM Budget Projections: Jan 2006 to Dec 2008, October 2005 ('Annex 1a')
- FIM Forum 2008 Report, Civil Society and Regional Multilateralism, FIM Forum 2008, February 8–9, 2008, Montréal, Quebec, Canada ('Annex 8')
- FIM Gender Policy, Approved by FIM Board February 10, 2008 ('Annex 9')
- FIM Muslim Project results-based framework ('Annex 5c')
- FIM Programme 2006–2008, Annual Progress Report (Narrative and Financial), July, 2007
- FIM Programme 2006–2008, Annual Progress Report (Narrative and Financial), July, 2008
- FIM Programme Framework, October 2005 ('Annex 1b')
- FIM's Research Programme 2008–2008 ('Annex 10')
- Kamiya, Motoyo, Ph.D., A Study of Formal Relationships between Civil Society and Multilateral Bodies: Accreditation and Other Consultative Modalities, a working paper commissioned jointly by FIM and Heinrich Böll Foundation, prepared for Building Bridges III, October 27–28, 2007, Dhaka, Bangladesh ('Annex 4')
- Khagram, Professor Sanjeev, Reforming the International Aid System: Transnational Struggles Over Big Dams for Sustainable Development ('Annex 3')
- Lejdemyr, Erik, Support to INGOs, international processes and initiative, within Sida's so-called "allocation to popular movements", August, 2008
- Meeting Report, Building Bridges III: Engaging Civil Society from Muslim States and Communities with the Multilateral Sphere, October 27 and 28, 2007, Dhaka, Bangladesh ('Annex 5')
- Montreal International Forum – Auditors Report and Financial Statements, March 2008
- Project Budget – FIM, September 2005 ('Annex 5b')

Ramirez, Marlene D., AsiaDHRRA and ASEAN: A Case Study on the Process of Civil Society Engagement with a Regional Intergovernmental Organisation, presented at the FIM Forum 2008 ('Annex 1')

Report on Implementation of Recommendations – “Consolidating the Gains – A Strategic Evaluation of the Forum International de Montréal”, prepared for Meeting of FIM Board of Directors, Montreal, Quebec Canada, February, 2008 ('Annex 3')

Request for Financial Support from Sida Sweden for the Montréal International Forum (FIM), Project: Civil Society from the Muslim countries and communities in relation to multilateralism, Workshop: Building Bridges, October 2005 ('Annex 5a')

Request for Three-Year Financial Support from Sida for the Montréal International Forum/Forum International de Montréal (FIM) October 2005–September 2008, presented to Sida October, 2005

Revised FIM Debt Reduction Plan, March 07

Sida Internal Memo, Assessment memo of Building Bridges Meeting and FIM Forum, Montreal 7–9 February, August, 2008

Thiès Meeting Report, Building Bridges: Engaging Civil Society from Muslim Countries and Communities with the Multilateral Sphere, Orientation for West African Civil Society and Steering Committee, Thiès, Senegal, March 10–12, 2008 ('Annex 6')

Thiès Steering Committee Notes, Building Bridges: Engaging Civil Society from Muslim Countries and Communities with the Multilateral Sphere, Steering Committee Meeting, Thiès, Senegal, March 10–12, 2008('Annex 7')

Recent Sida Evaluations

- 2008:52 Lessons Learnt and the Way Forward – The Collaboration between East Africa Legislative Assembly (EALA) and the European Parliamentarians for Africa (AWEPA) March 2005–April 2008**
Lisa von Trapp
Sida
- 2008:53 Zivikele Training – Gender Based Violence and HIV/AIDS Project in South Africa**
H.G. van Dijk, T. Chelechele, LP. Malan
Sida
- 2008:54 The University of Zambia School of Law Book Project: Post Project Evaluation Report**
Mwenda Silumesi
Sida
- 2008:55 The District Development Programme in Tanzania (DDP)**
John Carlsen, Solar Nazal
Sida
- 2008:56 Improved Land Management for Sustainable Development (RELMA-in ICRAF) Final Report**
Jan Erikson
Sida
- 2008:57 Global Trade Union Building in Defence of Workers' Rights Evaluation of Sida's Support to the LO-TCO Secretariat**
Frank Runchel, Agneta Gunnarsson, Jocke Nyberg
Sida
- 2008:58 Sida's Support to the Agency for Cooperation and Research in Development (ACORD) to the HIV and AIDS Support and Advocacy Programme (HASAP) in Uganda**
Narathius Asingwire, Swizen Kyomuhendo, Joseph Kiwanuka
Sida
- 2008:59 Sida's Support to the Africa Groups of Sweden's Development Cooperation**
Pia Sassarsson, Johanna Strandh
Sida
- 2008:60 Sida's Support to Save the Children Sweden's Development Cooperation**
Cecilia Magnusson-Ljungman, Morten Poulsen
Sida
- 2008:61 Regional AIDS Training Network (RATN), Strategic Plan 2004–2008**
Lovemore Zinyama, Peter Mazikana, Phares Mujinja
Sida

Recent Sida Reviews

- 2009:01 Swedish Health Forum in South Africa – from point of view of the Swedish Partner**
Staffan Engblom
Sida

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ASSESSMENT OF FORUM INTERNATIONAL DE MONTRÉAL (FIM)

The evaluation was undertaken with the aim to assess the current status of the organisational, administrative and financial situation of Forum International de Montréal (FIM). The study was carried out as a follow-up to an earlier assessment commissioned by FIM's other main donor, Novib. The conclusions will serve both as a basis for a change process within FIM and as a basis for Sida's assessment of future proposals for continued support to FIM. It also highlights the role and function of FIM in a wider context of global civil society processes.

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