

Institute of Development Studies

***MK4D***  
***Output to Purpose Review***

Submitted by



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BLDS

BRIDGE





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## Acronyms & Abbreviations

AFD	Agence Française de Développement
BLDS	British Library of Development Studies
CCU	Cross Cutting Unit
CRD	Central Research Dept
CSR	comprehensive spending review
CTG	Clear Thinking Group
IC	information and communication
ICDDR-B	International Center for Diarrhoeal Diseases Research – Bangladesh
ICT	Information and Communications Technology
IDS	Institute of Development Studies
INGO	International non-governmental organisation
IPM	Information Project Manager
ISU	Information Systems Unit
KPI	Key Performance Indicator
KT	knowledge translation
LC	Livelihoods Connect
LRC	Livelihoods Resource Centre
MDAs	Ministries, Departments and Agencies
M&E	monitoring and evaluation
MK4D	Mobilising Knowledge for Development
MOV	Means of Verification
MSC	Most Significant Change
NGO	Non-governmental organisation
NORAD	Norwegian Agency for Development Cooperation
OPR	Output to Purpose Review
OVI	Objectively Verifiable Indicator
PPA	Partnership Programme Agreement
RPC	Research Programme Consortium
SDC	Swiss Development Corporation
SIDA	Swedish International Development Administration
SLI	Strategic Learning Initiative

## Executive Summary

This is a positive review, and the reviewers have been impressed by the quality and quantity of information products from the projects, and the professionalism of the staff. We have also been awed by the volume of material produced directly or indirectly for the review. The review uses the data produced by the projects to illustrate the productivity and use of the services. The aim however is not to simply re-present the Information Dept's materials back to itself and DFID, so data are presented in summary form. The review has tried to focus more on providing assessment of processes and structures in a way that can inform the Strategic Review.

MK4D brought together in 2005 initially four, then five information services that DFID had been funding separately. Thus the aim of MK4D was to add value through:

- **Better integration** of the projects, including the development of a new shared software platform
- Increased **southern focus**
- Increased focus on the **development impact** of communicating development information

This review assesses the extent to which these aims are likely to be achieved by the end of the programme in September 2008.

The projects produce very high quality products, which their users value highly. The projects have individual identities, and these brands are recognised and trusted by users, and this reputation is given additional credence by the IDS name.

Products from the MK4D projects reach a large number of users in a very wide range of countries. The projects have collected a profusion of data to demonstrate their output and reach, and in parallel, have also collected narratives that illustrate information in use. Across the five projects and different products, about one third of users are based in developing countries, and the projects are attempting to increase the amount of southern-sourced content. Users come from a range of professional situations, and work or study in a range of public, private, third sector, and academic organisations.

For information services to be useful they need to meet three requirements:

- Ease of access – users need to be able to find the information easily – either due to the reputation of the service, by search engine, or by recommendation.
- Relevance of information - actors need to easily see the relevance of the information – by synthesis, by categorisation, by ease of links.
- Credibility of information – actors need to know that the information is not only credible in an academic sense but that it is credible "within their network". Is it endorsed by trustworthy agents? This points to the role of a strong advisory panel

The MK4D services score well on all three criteria – information is packages in a range of relevant formats and media; information is organised, packaged and presented in such a way that gives the user what they require for specific information tasks, and the information provided is perceived as very credible.

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Overall, the review scores MK4D as a '2' at the Purpose level.

The Purpose OVIs are difficult to assess as the data are directly not collected in a way that enables an assessment of the quantitative targets. Nonetheless, it is judged that MK4D is very close to hitting these targets<sup>1</sup> (although there are questions about the level of ambition in setting the Purpose OVIs). But the reason for awarding a '2' (rather than the '1' which MK4D awarded itself in its self-evaluation) comes at the Output level. Two Outputs scored 3, and progress has been less than might be expected along the track from autonomous projects to a joined-up programme. Integration has yet to be deep, particularly constrained by delays in the Oryx shared information system, and SLI-driven work, including developing a wide pool of southern peers and partners – critical for the future, and grasping the focus on impact and impact assessment, have been more incremental than the intention of MK4D suggests. In summary, the projects have delivered their products, but the added value from MK4D in the three areas of better integration, southern focus and development impact have yet to be fully realised.

The MK4D projects continue to serve a significant function in development. Indeed the projects, alongside other information services, such as Sci.Dev.Net, have proven the importance of 'info-mediaries' in the development process. These are useful and important services for development, and dealing in global public goods, should continue to be funded. The service is particularly important given DFID's increased research funding. Hence the review recommends that DFID continues to fund MK4D, but with modification. This funding should be for 3 to 5 years at a level not less than at present.

A number of areas need to be addressed by MK4D going forwards in to a next phase, in order to improve performance. These include:

- A step change in the involvement of southern partners.
- More marketing, linking this to user profiling
- Integration of services
- Impact assessment

The review makes a number of recommendations for the next phase of MK4D

- Bundling has been the right move, however a DFID-only bundle limits the gains to be derived from bundling. The Information Dept should aim to persuade all donors to contribute to a single Information Services basket fund, against a single Information Services performance framework. Fund-raising for the basket should aim to reduce the dependence on DFID. It is understood that INASP/PERI used a model of a donor funding round-table, which seems appropriate.
- To date bundling, and the activities carried out by SLI, have not tended to reduce the work load of the projects. Identifying real efficiency gains must be a high priority for the next phase. It is suggested that to centralise marketing and M&E functions in SLI, with the aims of: i) achieving a critical mass of marketing effort, and b) focusing M&E

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<sup>1</sup> Data collated by the SLI after the review has shown that the targets have been hit

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on aggregate impact. Bundling will have been value for money only if the bundling dividend is clearly evident from the outset of the next phase.

- MK4D suffers from too many logframes. The current profusion of logframes is a barrier to integration and efficient working. It also catalyses a profusion of reporting, which detracts from the big picture of demonstrating impact. Each project owns its own logframe, but the MK4D logframe is only owned by SLI. It is recommended that a single Information Services logframe is developed for the next phase, against which DFID would contribute its funding. The individual projects would not be projects, but services, and would deliver against simpler results frameworks and business plans, without the need for each to have its own multi-tiered logframe.
- Under a basket funding modality, the services would continue to operate as now, but with some changes. Eldis, id21, and BRIDGE would firmly maintain their own identities. This review does not recommend conflation of MK4D into a mega-Eldis. These three services have distinct identities and services, and effectively segment the market. MK4D should review the status of Livelihoods Connect, which might become a sustainable livelihoods theme in Eldis alongside other disciplinary themes and also a self-sustaining Community of Practice of livelihoods professionals. BLDS has successfully started to orient itself towards southern users, through links to research Programme Consortium and through document delivery via GNet, and hence remains an important part of the bundle.
- The Knowledge Services have developed over time around the in-house expertise in the Information Dept. This has resulted in a model that is now rather centralised – too centralised. To improve relevance to target southern users, and to be attractive for future funding, a concerted effort is needed to move to a more distributed / networked model with significant operations in the south. IDS has a crucial role in direction, horizon scanning, quality assurance and underwriting the services' reputation, but innovation is needed to involve a much greater quantum of southern peers and partners. This is not about southern content, which will follow, it is about seeking new ways of working, such as southern hubs, 'franchising' the brands to southern associates, and southern 'stringers'. It may also be about southern donors, NEPAD, etc. This greater involvement with southern partners will require considerable investment in capacity development. The complexities (compared with centralised services), time required to develop partnerships and capacities, the costs of establishing partnerships, the potential politics of having multiple organisations involves, and even carbon footprint issues relating to establishing and maintaining partnership, all need to be borne in mind when embarking on a more southern-oriented and partnership-based approach. It is likely that the next three years will be a transition of another kind.
- The feedback from the country visits and the web-survey is that MK4D services are under-marketed, as development professionals are either not aware of them, or are aware of only one of the services. The next phase of MK4D will need to set some stretching marketing targets.



## 1. Introduction

### 1.1 About the review

This report, together with its annexes, constitutes the Output to Purpose Review (OPR) for the Mobilising Knowledge for Development (MK4D) programme. The OPR is a DFID requirement for all programmes with a value in excess of £1 million. The minimum mandatory content of an OPR is a completed OPR form (Annex 9), which is loaded on to DFID's internal PRISM information system, and forms part of the record of the programme. However, this report aims to be more than just the completion of the OPR form with the associated rating of MK4D on DFID's 5 point scale. The current 3 year tranche of DFID funding for MK4D ends in 2008, and the Information Department at the Institute of Development Studies (IDS), who manage MK4D, is also just starting its own strategic review. This OPR aims to inform decisions about future funding, and together with the accompanying Eldis Evaluation, inform the strategic review.

The OPR is based on the over-arching MK4D logframe. Each of the five services that make up the MK4D programme have their own individual logframes, but this review does not examine these in depth, but focuses on the achievements of MK4D, and therefore by association the role of the Strategic Learning Initiative (SLI), which was established to help deliver MK4D. It should also be noted that this review has been conducted in parallel with a separate evaluation of Eldis for the group of four donors<sup>2</sup> that fund that service.

Two features are distinctive about this OPR:

- i) the very large amount of information that has been made available to the evaluators – the Information Department has provided over 120 documents, most of which have a high degree of relevance to the evaluation (Annex 7)
- ii) the highly reflective way that the Information Department operates – it is typical of an academic environment with a peer-based management style, which is inclusive, discursive and self-reflexive. Thus the review has had both a surfeit of material on the conception, design, operation and performance of MK4D and its projects as well as having been preceded in most of its actions by activities (reviews, surveys, debates, etc) which the projects had already completed themselves.

At the outset of the review, both DFID and the Information Department were asked what were the key questions that they would like this OPR to address. The Information Dept was keen for the OPR to demonstrate whether the role of an 'information intermediary' (info-mediary) is a valid and proven one in the development process – this was experimental when the services were established. DFID wanted the OPR to particularly consider the development impacts of MK4D, as well as constraints to its operation, and demand for its services.

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<sup>2</sup> NORAD, SDC, SIDA, plus DFID through MK4D

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## 1.2 Background to MK4D and the knowledge services

MK4D encompasses a group of five **knowledge services** which aim to reduce global poverty and injustice by supporting more informed decision-making by those in a position to influence change. DFID is MK4D's main funder, and it is managed by IDS. The five services which comprise MK4D are:

- **BLDS** – the British Library for Development Studies, a large specialist library on social and economic aspects of development
- **BRIDGE** – a gender and development research and communications service supporting gender advocacy and mainstreaming efforts
- **Eldis** – a gateway to online development information
- **id21** – a research reporting service aimed at policy makers and practitioners worldwide
- **Livelihoods Connect** – a 'learning platform' focusing on sustainable livelihood approaches to poverty reduction<sup>3</sup>

MK4D is known within IDS as '**the bundle**', and the five services as '**projects**'.

All five projects were "*well established, with strong reputations and a large international user base*"<sup>4</sup> when MK4D commenced in April 2005<sup>5</sup>. They had been funded separately by different parts of DFID in the past, and the opportunity to bring them together coincided with reorganisation within DFID, which resulted in id21, Eldis, BRIDGE, and BLDS all coming under the management of Central Research Department. Livelihoods Connect was added to the bundle at a later date, from Policy Division. The aim of bringing the projects together into one unified funding arrangement was twofold:

- to encourage productive synergies between the services
- to simplify reporting arrangements with DFID<sup>6</sup>

The proposal also included details of a new set of **cross-cutting activities** that aimed to strengthen and coordinate efforts in marketing, monitoring and evaluation, research, and capacity building as the remit of the Strategic Learning Initiative (SLI), plus Information and Communication Technology (ICT) system development across the services, as the remit of the Information Services Unit (ISU).

MK4D was budgeted to cost £9.74 million over three years, with £6.93m to be contributed by DFID and £2.81m which was already secured from other donors, for specific projects, at the

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<sup>3</sup> Livelihoods Connect was not initially in the bundle – it joined in 2006

<sup>4</sup> MK4D Proposal Submission to DFID (2005)

<sup>5</sup> **BRIDGE** was established at the request of the OECD/DAC Working Party on Gender Equality, in 1992. **Eldis** was established in 1995 as an experimental project - pioneering new approaches to organising and presenting development information on the web and via e-mail. **id21** started in 1997 in response to a DFID tender seeking ideas on how to improve the dissemination of UK-based social and economic development research.

<sup>6</sup> IDS knowledge services had previously been funded from as many as nine different DFID Departments, and the creation of the Central Research Dept (CRD) brought BLDS, BRIDGE, id21 and Eldis under the same department for the first time. This gave the scope to focus seriously on options for closer integration.

time of submitting the MK4D proposal to DFID: Eldis (£0.85m), BLDS (£1.19m) and BRIDGE (£0.77m).

### 1.3 Use of terminology

**MK4D** is known as ‘**the bundle**’ within the IDS Information Dept. This report uses both terms, but tries to distinguish between MK4D as the umbrella programme and individual knowledge services where relevant.

The five **knowledge services** are known as **the projects** within the IDS Information Dept. Both terms are used in this report. However, it is suggested that efforts should be made to use ‘knowledge services,’ or ‘**services**’ as the ‘project’ terminology promotes the idea of time-bound delivery of specific outputs, rather than an on-going service, funded using a non-project modality.

There is an epistemological debate over the use of the terms **knowledge** and **information**. The debate has been had in the Information Dept, but not fully resolved. The MK4D proposal uses a definition from Panos, that “*knowledge is the sense people make of information*”. Thus the IDS Knowledge Services see themselves as promoting knowledge sharing by facilitating the flow of information, making that information understandable to readers, so they can make sense of it. It is not the role of this review to solve this debate, but is noted that while some see it as being knowledge that is shared because it is selected and summarised by the services, because knowledge suggests working to a higher standard, and because sharing information implies a greater claim to impartiality. Others see information as what can be transmitted and knowledge as what individuals know, so that knowledge sharing is infeasible, and that it is used partly because it sounds more sophisticated than information sharing. Hence the core definitions of what MK4D does could be seen to be disputed, though this review accepts that the Information Dept promotes knowledge by sharing information, and that development can be promoted by mobilising people’s knowledge.

## 2. Methodology

The review team consisted of a core of two reviewers, plus three consultants based in developing countries who each conducted one of the country studies, an information systems specialist who reviewed Oryx, and a researcher who conducted the web survey and Google study.

The methodology used for this review draws on both primary and secondary sources. The secondary sources are the very large number of reports, reviews, and surveys undertaken by the Information Dept and the projects themselves over the course of MK4D to date, and as well as the web and usage statistics that have been collected. An important element of the information provided by MK4D and the projects was a self-evaluation, using a modified version of the OPR form. The review did not have time to, and was not tasked to also review each of the five projects individually, hence self-evaluation was an efficient means to assemble information on their performance against their logframes. The MK4D self-evaluation was a very useful synthesis of their performance information.

The review supplemented this array of information with interviews and some targeted surveys. Interviews have been conducted with:

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- Information Dept and project staff, including a small separate study of Oryx in which ISU and Eldis staff were interviewed by an 'ICT for development' specialist
  - DFID staff, plus other donor staff for the Eldis evaluation
  - a cross-section of project users from Bangladesh, Malawi and Tanzania, from a list of registered users supplied by the projects. We interviewed a small sample of 25, 11, and 18 people in the Bangladesh, Malawi and Tanzania respectively, from a range of professional backgrounds (Annex 6).

Interviews have mainly been face-to-face and one-to-one, using tailored checklists of questions, however some have been by phone, and a few in a group setting.

We have used three complementary approaches to assess use and usefulness of the knowledge services:

- A horizontal sample of users across the services - the three country interviews above
- A counterfactual approach that targeted development professionals in general, with the assumption that it includes both users and non-users. The aim being to find out where people obtain development information, if not from the MK4D projects, and for those that do use them, how they rate them against other services. We conducted a web survey, using Survey Monkey for this part of the review. The survey was distributed to 75 development professionals (Annex 6) from list of development professional available to the reviewers, about whom it was not known in advance whether they were users of the knowledge services.
- A vertical approach, identifying trade as a 'hot topic' for many of the projects. We investigated how well the projects' trade issues feature in Google, as the most used search engine.

The review was conducted between mid-May and early October. It has thus been a 'long and thin' review. Initial interviews with IDS staff were held in May, and at this time a list of documents and data that IDS would assemble for the review was agreed. A number of these items had not been produced at the start of the evaluation, and the evaluation was a stimulus for their production. A significant amount of this information was needed as Means of Verification (MOVs) for the services' and MK4D's logframe. The majority of the documents were assembled during July, although some documents continued to arrive into September. In-country interviews were conducted in July and August, and the web survey and search engine research in August and September, when further interviews were also conducted in September.

Methodologically, the review was constrained as a number of the impact parameters had not been explicitly defined at the outset of MK4D. By not clarifying the impact parameters ex-ante, the evaluation had to work hard to extract its parameters from the large volume programme documentation. Prime amongst these parameters were a definition of the user community and the main patterns of information use and development practice that MK4D expected to influence. Useful guidance on setting up an impact evaluation in the context of information for development is provided by Menou<sup>7</sup>:

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<sup>7</sup> Menou, M.J. (1993). *Measuring the Impact of Information on Development*. IDRC, Canada.

### Steps in the assessment process

Before undertaking an impact assessment, a number of prerequisites should be met. Based in part on the results of the computer conference and on various assumptions about the assessment process that were expressed at the post-conference workshop, the following prerequisites were established. The list is not necessarily exhaustive.

- Define the user community.
- Define the development issue(s) and program(s) to which the information activity(ies) or project(s) in question are contributing.
- Identify the main patterns of operation of the global information life cycle and the factors that influence its effectiveness for the defined user community and issue.
- Describe target audiences (those who will use the indicators) for the results of the assessment.
- Describe the information use environments (IUEs) of the user community(ies) and the target audiences (see Chapter 4 for a detailed description of the IUE concept).
- Set up standard guidelines for collecting, analyzing, interpreting, and presenting anecdotes and other data.
- Assemble baseline data.

After the prerequisites have been met, it is necessary to work collaboratively with representatives of the beneficiary groups (both decision-makers and end-users) to determine the perceived or expected benefits of information activities and products.

There is also useful guidance on Describing Constituencies and the 'information use environment', as well as on Indicators, which describes five kinds of indicators for this type of project:

- Performance indicators relating inputs to outputs;
- Effectiveness indicators relating outputs to usage;
- Cost-effectiveness indicators relating inputs to usage;
- Cost-benefit indicators relating inputs to outcomes; and
- impact indicators relating usage to outcomes.

*Menou (1993). Chapter 6.*

### 3. Achievements

When MK4D was created, it built on a very strong information service legacy in IDS. It inherited:

- a **well-skilled staff**, with skills including librarianship, information systems, knowledge management, website hosting, and professional writing. It had specialist subject knowledge across a broad range of development topics.
- a **significant collection** of high quality and diverse electronic and paper-based **content** across a range of development topics
- a **large user-base** drawn from across the developed and developing world
- a **strong reputation and brand image**. This builds on IDS' reputation as an internationally-respected centre for research and teaching in development studies, but the services had developed their own distinct brand identities and reputations in their own right. IDS holds the intellectual property rights to the services

The question for the evaluation therefore, is how has MK4D built on this inheritance and added value? i.e. how has the contribution of the knowledge services to development improved through bundling them in MK4D, as opposed to running five separate services?

Prior to MK4D, IDS considered that: *"A shared technical platform and management structure was the main glue that held the IDS information family together."*<sup>8</sup> The technical platform in use prior to 2005 was a patchwork of packages, and was reaching the limits of its functionality. The services were sharing some information, but were essentially autonomous projects with clear but separate remits. Thus the aim of MK4D was to add value through:

- **Better integration** of the projects, including the development of a new shared software platform
- Increased **southern focus**
- Increased focus on the **development impact** of communicating development information

This review assesses the evolution of the services and progress on these fronts, against targets in the MK4D logframe.

#### 3.1 Expectations

In reaching a judgement on the performance of MK4D, this review has tried to identify the real expectations that existed of the added value that would be obtained by creating the MK4D bundle. The expectations relate to underlying reasons for bundling, which were a combination of, on one hand, a pragmatic means to streamline management and administration within DFID, and on the other, an opportunity to increase impact and efficiency by promoting closer integration between the projects.

By the start of MK4D, the projects had been running for anything up to 13 years, so bundling was bring together mature services. However, the evidence from Information Department

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<sup>8</sup> MK4D proposal (2005)

documents is that, despite their long history, working collectively was generally new for the projects:

- *“The aims were: ...Explore how to promote the Knowledge Services collectively as this had not been done much previously”<sup>9</sup>*
- *“the experience of the department in capacity building/development had previously been quite ad hoc, so in a lot of ways we were coming from a virtually standing start”<sup>10</sup>*

The question therefore is whether a high level of synergy should be expected at this point in MK4D though bringing the projects together in a bundle, or whether MK4D was a transitional phase, bringing the projects together and preparing them and the Information Department for a new way of integrated working, which would be in place for the start of a further phase.

The Information Dept M&E Strategy<sup>11</sup> says: *“This is very much a period of transition for how the projects in the information department fit together”*, but the logframe is not very clear about this. Some OVIs strongly suggest MK4D is a preparatory or transition phase (emphasis added):

- Under Output 2: *“IDS Knowledge Services staff design and plan future joint activities and services based on evidence and learning”*
- Under Output 5: *“Proposals for next programme phase include clear statements of how the programme relates to changes in information and communication problems” and “Proposals for the next programme phase have clear definitions of core concepts such as ‘knowledge’, ‘communication’ and communication problems”*
- Under Output 6: *“Clear understanding of how IDS Knowledge Services can support capacity development of Southern organisations in the next phase”*

Other OVIs suggest integrated working and synergistic performance within the life of MK4D:

- Under Output 2: *“Cross-project management structures in place and working effectively, with DFID steering group providing periodic oversight & strategy guidance” and “IDS Knowledge Service staff share evidence & lessons with each other about how their work affects the work of development actors in different contexts”*
- Under Output 3: *“OP3: Number of contacts agreeing to be contacted regularly with information from all the IDS Knowledge Services increased from 300 to 1000 by September 2008”*

This gives a rather mixed message. Has MK4D bundling been about preparing for joint working, but achieving additivity, or has the bundling been about integration and achieving more than the sum of the parts during the phase?

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<sup>9</sup> Aims of Marketing Strategy Sept '06 – Aug '07. In: *Strategic Learning Initiative Marketing Strategy*. December 2006 to April 2008. (2006).

<sup>10</sup> *Overview of capacity development stream of work – March 07*

<sup>11</sup> Wendt, D. (2006) *Information Department M&E Strategy*.

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On balance, the review finds that this phase of MK4D has mainly been a transitional one, but, one that will have been value for money only if the bundling dividend is clearly evident from the outset of the next phase.

### 3.2 Current MK4D Output and Purpose Achievement

The MK4D logframe is presented in full in Annex 1. A summary of the logframe, with the objectives of MK4D is presented below (Table 1).

The MK4D logframe has had on-going development through the course of the programme, with a further revised version being produced just prior to the OPR. The projects have also had on-going logframe development, and external support has been provided in logframe development. The on-going revisions perhaps demonstrate the difficult task the MK4D logframe has to achieve; it must:

- Define a clear, achievable, and measurable development objective
- Act a logical tier of objectives above the five services' logframes
- Retrofit on to the five services' logframe
- Provide measurable objectives for the functions of the SLI

As seen in Section 3.3, the logframe has not entirely succeeded in all these tasks. There is some contorted logic in the relationships between the MK4D logframe and the projects' logframes. There are difficulties with the Objectively Verifiable Indicators (OVIs) and hence the measurability of the Purpose. And, overall, the balance of MK4D Outputs is more oriented towards the SLI functions than summative of the services' achievements.

#### 3.2.1. Purpose level achievement

The Purpose statement "*Development actors increase their use of the global pool of knowledge on development*" is broad. However the OVIs provide some definition, by giving some clarification of which types of development organisation it targets MK4D targets, and by giving some indication what 'use' may be taken to mean. In this context, the review has interpreted use to mean both:

- specific use of MK4D knowledge services – putting the knowledge into action and achieving a direct impact
- more general use – in terms of improving development actors' awareness and understanding of development topics

In relation to specific use, almost inevitably assessment of this type of use will rely on a narrative approach, and be based on case study examples. MK4D has been good at collecting these<sup>12</sup>. However they have not been systematically organised to best demonstrate the projects' achievements in MK4D, nor do they explain whether these were the type and volume of impacts expected, i.e. they do not link back to an MK4D theory of change. It is recommended that this would be one area in which MK4D could strength its own and the projects' M&E.

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<sup>12</sup> E.g. Appendix 1 to MK4D's self-evaluation: *Stories of Use*.



Table 1. Summary MK4D Logframe

Objective	Indicators of achievement
<b>GOAL:</b> Global poverty and injustice reduced as a result of better informed decision-making by development policy makers and practitioners <b>PURPOSE:</b> Development actors increase their use of the global pool of knowledge on development	<ul style="list-style-type: none"> <li>• Recognition of the value of research as a contributor to policy and practice</li> <li>• Use of, and reference to, research and other evidence in policy and planning processes</li> <li>• Diversity of viewpoints taken into account in decision making</li> <li>• Informed debate on development issues within public and professional for a</li> <li>• By September 2008 IDS Knowledge Services <b>used and appreciated</b> by: <ul style="list-style-type: none"> <li>- 15 Southern government agencies</li> <li>- 100 Southern-based NGOs</li> <li>- 50 international NGOs</li> <li>- 10 OECD/DAC aid agencies</li> <li>- 10 multilateral development agencies</li> <li>- 100 research organisations worldwide</li> </ul> </li> <li>• Specific instances where IDS knowledge services have been used and have had a <b>positive impact</b> on the work of development actors</li> </ul>
<b>OUTPUT 1:</b> Knowledge gaps bridged between research, policy and practice	By September 2008: <ul style="list-style-type: none"> <li>• A <b>diverse knowledge base</b> on development which includes a wide range of perspectives and geographical &amp; organisational sources</li> <li>• An <b>accessible knowledge base</b> on development which includes a range of easy to use formats and delivery mechanisms</li> <li>• Specific instances where IDS Knowledge Services have <b>contributed</b> to debates and exchanges among development actors in a range of contexts</li> <li>• Specific instances where IDS Knowledge Services have <b>contributed</b> to <b>gender</b> advocacy and mainstreaming efforts</li> <li>• Specific instances where IDS Knowledge Services have <b>contributed</b> to enhancing understanding of <b>sustainable livelihoods</b> thinking and approaches among development actors</li> </ul>
<b>OUTPUT 2:</b> IDS Knowledge Services effectively managed to maximise their combined impact and effectiveness	<ul style="list-style-type: none"> <li>• <b>Cross-project management structures</b> in place and working effectively, with DFID steering group providing periodic oversight &amp; strategy guidance</li> <li>• IDS Knowledge Services <b>achieve their objectives</b> (see individual logframes for each of the five Knowledge Services)</li> <li>• IDS Knowledge Service <b>staff share evidence &amp; lessons</b> with each other about how their work affects the work of development actors in different contexts</li> <li>• IDS Knowledge Services staff design and plan <b>future joint activities and services</b> based on evidence and learning</li> <li>• IDS Information staff respond to users and other stakeholders by connecting the IDS Knowledge Services in ways <b>tailored</b> to stakeholders' needs</li> </ul>
<b>OUTPUT 3:</b> A widespread awareness of the collection of IDS Knowledge Services amongst development actors,	<ul style="list-style-type: none"> <li>• <b>Number of contacts</b> agreeing to be contacted regularly with information from all the IDS Knowledge Services increased from 300 to 1000 by September 2008</li> <li>• At least 20 <b>new contacts</b> based in organisations in low to middle income countries and at least 10 new contacts based in international</li> </ul>

Objective	Indicators of achievement
<p>especially in the South, through marketing and relationship-building</p> <p><b>OUTPUT 4:</b></p> <p>IDS Knowledge Services are able to demonstrate how they have contributed towards bridging knowledge gaps between research, policy and practice and are able to apply this learning to their collective future practice.</p> <p><b>OUTPUT 5:</b></p> <p>Improved understanding of information, communication and knowledge dynamics. Lessons learned about how intermediaries (such as IDS) affect these dynamics</p> <p><b>OUTPUT 6:</b></p> <p>Enhanced capacity of Southern organisations to improve their stakeholders' access to, and use of, development knowledge through information and communication interventions</p> <p><b>OUTPUT 7:</b></p> <p>A powerful and versatile new technical platform that allows content to be managed, shared and accessed by users more effectively</p>	<ul style="list-style-type: none"> <li>organisations have <b>promoted IDS Knowledge Services</b> to their networks</li> <li>Partners give open and honest <b>feedback</b> to IDS about its Knowledge Services</li> <li>Projects are implementing evaluation plans by the end of 2006</li> <li>An overall Knowledge Services evaluation plan is being implemented by the end of 2006</li> <li>IDS Information staff able to draw on and share lessons amongst themselves and the wider development information community about approaches, methods and skills for monitoring and evaluation by the end of 2007</li> <li>Reference to lessons from past experience (successes and failures) in project proposals for future programmes by the end of 2007</li> <li></li> <li>An analysis of the information and communication problems affecting the work of selected development actors involved six development issue areas available by August 2007</li> <li>Proposals for the next programme phase have clear definitions of core concepts such as 'knowledge', 'communication' and 'intermediary'</li> <li>Proposals for next programme phase include clear statements of how the programme relates to changes in information and communication problems</li> <li>Research findings shared with key peer organizations in the development information community</li> <li></li> <li>Clear understanding of how IDS Knowledge Services can support capacity development of Southern organisations in the next phase</li> <li>Specific instances where Southern organisations have drawn on evidence, and shared lessons about, information and communication interventions in their information communication programme planning as a result of advice, facilitation or partnership with IDS Knowledge Services by September 2008</li> <li></li> <li>The new "Oryx" system in use by Eldis by early 2006 and rolled out across other services subsequently.</li> <li>The "Ibex" library system search facility in use by early 2006, with the remaining functionality introduced subsequently</li> </ul>

Nonetheless, the MK4D projects have made particular efforts to collect evidence that shows that information supplied by them has been put into policy or practical use. This has indeed been in the form of case study type narratives (or 'Bios'), mostly short, and generally ad hoc. Examples of the use of products that have had impact range from policy - informing SIDA's gender strategy in Moldova to practice: basic literacy radio programmes in Nigeria and water rights in Malawi. MK4D's Self-Evaluation appendix on the contribution of the knowledge services<sup>13</sup> contains the best available example of trying to provide a structure to these narratives, relating it back to how it was thought that the services would work. However this level of structure is not generally seen in the qualitative M&E.

**Overall**, according to the strict letter of the OVI – 'specific instances' of impact have been achieved.

Although a small number of prized quotes, such as the water rights one from Malawi, do start to become rather familiar after short amount of time with the MK4D documentation, the 'best' quotes demonstrating use are used constructively in the reporting, and do make a reasonably convincing case for impact. But, the case is weakened by the imprecision in the OVI – how many specific examples, and in what parts of the development process, were impacts anticipated? The MK4D and project documentation shows that this has been thought about, but by not having a better defined indicator, the level of permissiveness means that almost anything can be said to verify Purpose level achievement.

In relation to the general use of the services, the indicator is meant to be an aggregate of the five projects' quantitative / production indicators. However, the projects' logframes are not created to provide this information in this format, and hence the M&E data have not been collected to be able to simply validate what are quite straightforward targets. The projects do have good records of output and product, eg 37,000 unique subscribers to Eldis; print circulation of 56,000 of id21's insights; 3,400 subscribers to Livelihoods Connect; and 452 documents delivered by BLDS. But they do not have good classification of their user base. It may be **assumed** that with these volumes of output, and over 150,000 unique visitors to the projects' websites each month that the quantitative use targets by type of organisation are likely to have been met. However MK4D cannot at this time prove it.

#### **Postscript (21<sup>st</sup> December 2007)**

After the evaluation period and submission of the final report, the Info Dept was able to collate statistics on use of the services. The figures come from:

- 1303 respondents to five Eldis online surveys – on their Reporters on: Agriculture; Conflict; Education; CSR; Trade (in 2006 & 2007)
- 1101 respondents to an id21 paper survey on id21 insights (2006)
- 734 respondents to an HDI survey on their Health Reporters (2007)

After cleaning the data and removing essentially null responses, a smaller sample size of 2426 was calculated. Although it is not clear from the available information if the same

<sup>13</sup> Appendix 1 – MK4D Stories of use: *Examples where the knowledge services have contributed to debates and exchanges among development actors in a range of contexts.*

respondent may have responded to more than one survey, and although HDI – not strictly part of MK4D – is included, the data do show that MK4D has exceeded the achievement of its Purpose level quantitative targets by a large margin:

Type of organisation	Respondents	% responses	Logframe target
Research organisation	855	35	100 orgs
(Private Company)*	386	16	-
International NGO	370	15	50 orgs
Southern Government Agencies	256	11	15 orgs
Southern Based NGO	183	8	100 orgs
Multilateral Development Agency	91	4	10 orgs
OECD/DAC Aid Agency	67	3	10 orgs
(Media)*	31	1	-
Other and unknown	183	7	-
<b>Total</b>	<b>2426</b>	<b>100%</b>	

\* Not in the original logframe purpose statement targets

Collating the data on email subscribers reveals that there are currently 90,384 unique subscribers to a wide variety of IDS Knowledge Services email updates. This includes:

- 1012 subscribers from UN agencies
- 920 subscribers from DFID
- 503 subscribers from the World Bank
- 223 subscribers from FAO
- 112 subscribers from WHO
- 39 subscribers from the IMF

It should be noted that these organisational figures only include people who are subscribed using a work email address (as identified using their domain name). However this figure is likely to be larger as many people are subscribed under with their yahoo or hotmail email addresses.

### 3.2.2. Output level achievement

The output level achievements have been reviewed in the OPR pro forma (Annex 9), and information on progress against logframe targets is provided in the MK4D self-evaluation. This review also particularly examines the performance of the SLI functions, which relate to Outputs 2 to 7, in Section 5 – Effectiveness and Efficiency. Therefore, these Outputs are not also covered in this section.

#### Output 1

This output is concerned mainly with the knowledge base – its diversity and accessibility. There are also three OVIs relating to ‘specific instances’ of information in use, in three contexts, but these are essentially a repeat of the ‘specific instances’ OVI at the Purpose level. The general context is directly addressed in the Purpose and the gender and sustainable livelihoods contexts are demonstrably proven in their self-evaluations, especially for BRIDGE.

MK4D has found it difficult to define a 'diverse' knowledge base, and this is not elucidated in the projects' logframes either. MK4D has used source country, country focus and type of information resource as the main diversity axes, and it can demonstrate that it has achieved a broad mix of outputs on all three counts.

However, the one area where MK4D has found variable results is in terms of the amount of southern content added since 2005. Approximately 15% of Siyanda's resources are from Southern organisations, 16% of Eldis' content is Southern and Livelihoods Connect and id21 insights articles around 33% are from the South. BLDS indexes articles from 173 development journals; 62% are published in Southern countries. These findings are not directly comparable as they measure different types of content, and the MK4D recognises the need for systems to collect more comparable data. Nonetheless with about of third of users from the south, but with targets to increase this, levels of southern content of around 15% are currently low, and needs to be addressed as a priority in the next phase.

An accessible knowledge base has been a particular strength of the MK4D projects – information is available electronically – online and on CD-ROM, and in a variety of print formats. Information is made available in a range of formats and styles – email updates and summaries, short and long abstracts, full length text, summaries, briefing packs, news feeds, and a new community web site is under development. These cater to the range of users from highly IT-literate users in development agencies, who may only require an update on current issues, to those in the South without internet access, who depend on print copies for information.

The country studies revealed that while most users do use the internet for searching for information, connection speeds, learning style preferences and the desire to distribute materials mean that users continue to value paper copy and CD-ROMs very highly. Thus the 56,000 hard copies of id21 insights and the 4,400 Eldis CD ROMs are still very valid forms of output. Where bandwidth is limited, but users computer literate, the email bulletins are similarly valued.

Considering language aspects of diversity, French and Spanish versions of BRIDGE, id21 and Eldis products are produced, and Eldis is due to launch a French Eldis, funded by Agence Française de Développement (AFD).

## **Output 2**

The internal management aspects of this Output are covered in Section 5 of the report. This part considers the projects' achievements.

A core indicator of use have been the statistics relating to use of the projects' websites (i.e. their webstats), which are now on a common basis using the ABCE<sup>14</sup> standards and ISSEL 'geocountry' analysis. The recent processing of the 2006 and 2007 data show that there is a distinctive seasonal pattern to the use of the websites, with peaks in October – December and April – June (Figure 1). Given that between 50% – 70% of users are from the North, and

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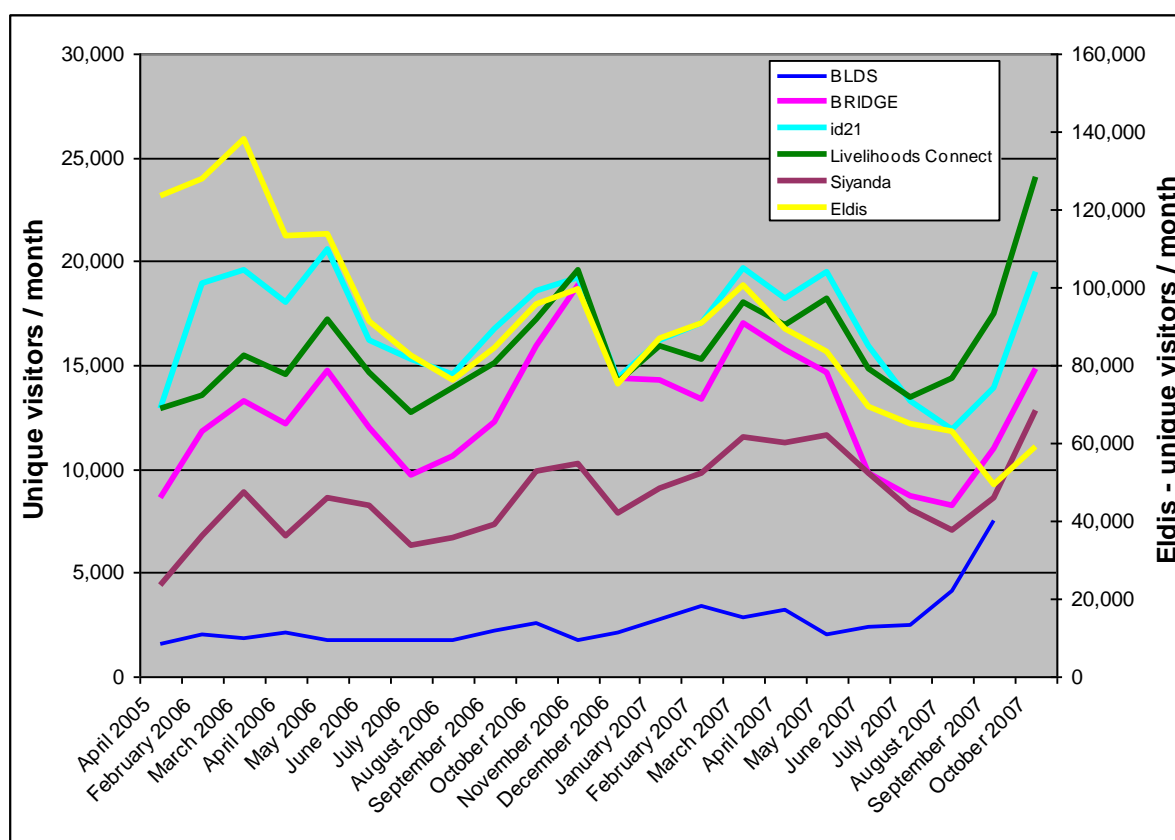
<sup>14</sup> ABC Electronic is the industry-owned, tri-partite, not-for-profit organisation that works with and for media owners, advertisers and media buyers to help them better understand and gain confidence in the data they use

these dates coincide with academic term times, it is likely that part of these peaks can be attribute to use in Universities, particularly by students.

Though these are not a core audience, their use is in itself not problematic as the services remain available for other users, and many of the student may go on to be influential development actors, who will be habituated in using the MK4D services.

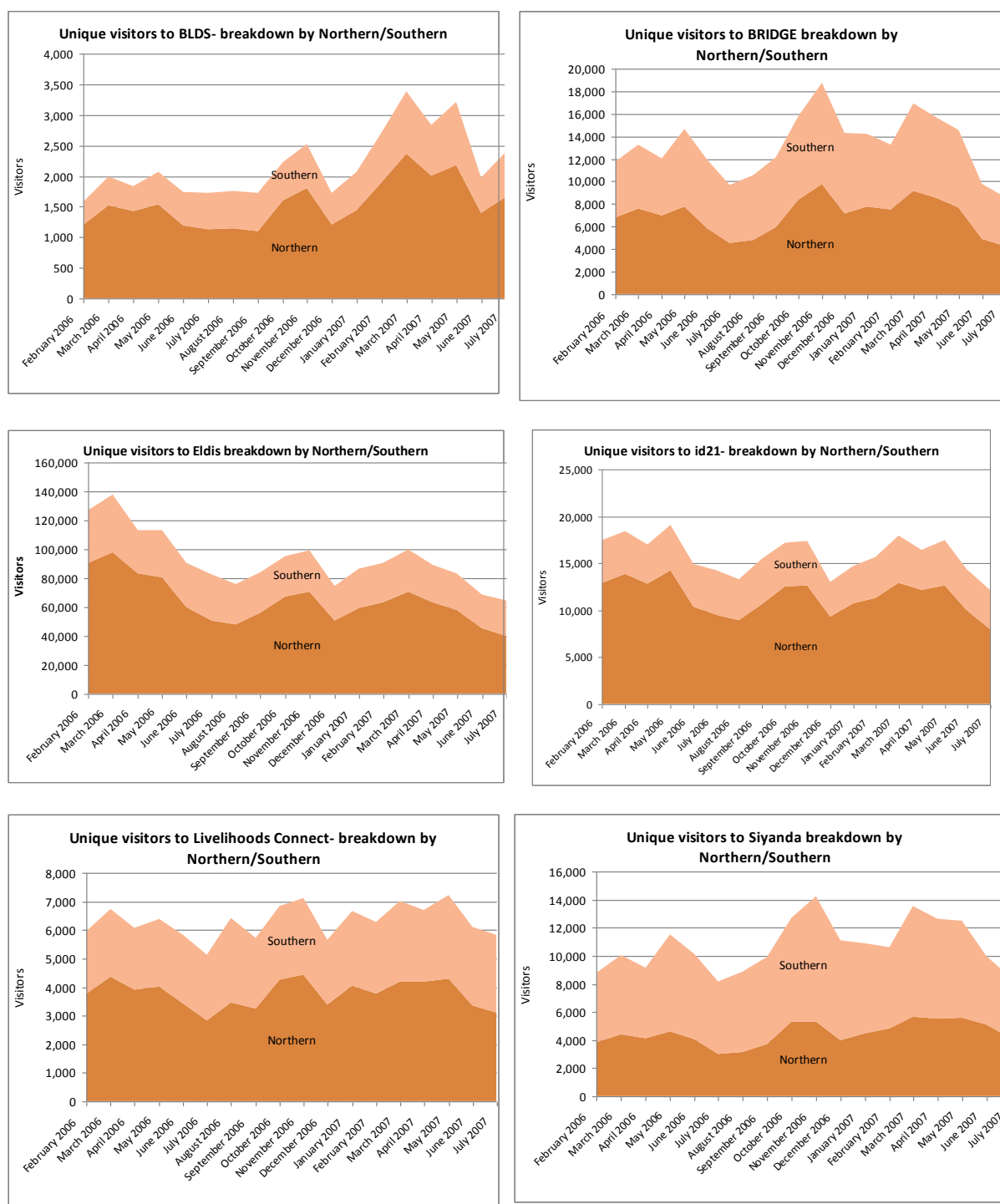
The services have targets to increase usage over time, and this is also a demonstration of effective marketing. Figure 2 shows the number of unique visitors to each service each month, using the ABCE data.

**Figure 1a. Unique visitors each month to the websites of the five services and Siyanda<sup>15</sup>**



The seasonal variations make the overall patterns more difficult to detect, though it can be seen that visitors to Eldis have declined over time, and that the other five services have shown a very dramatic increase in monthly visitor numbers in the last two months – this is also true of Eldis to a limited extent. If the average monthly number of visitors in 2006 is compared to 2007, the following results are obtained (Table 2):

<sup>15</sup> Based on IDS' monthly webstats.

**Figure 2. Visitor figures for the MK4D Services.<sup>16, 17</sup>** Note different Y axis scales for each service.

<sup>16</sup> Country breakdowns are based on Geocountry software which is 90-95% accurate in identifying the country of origin for the IP address of the visitor

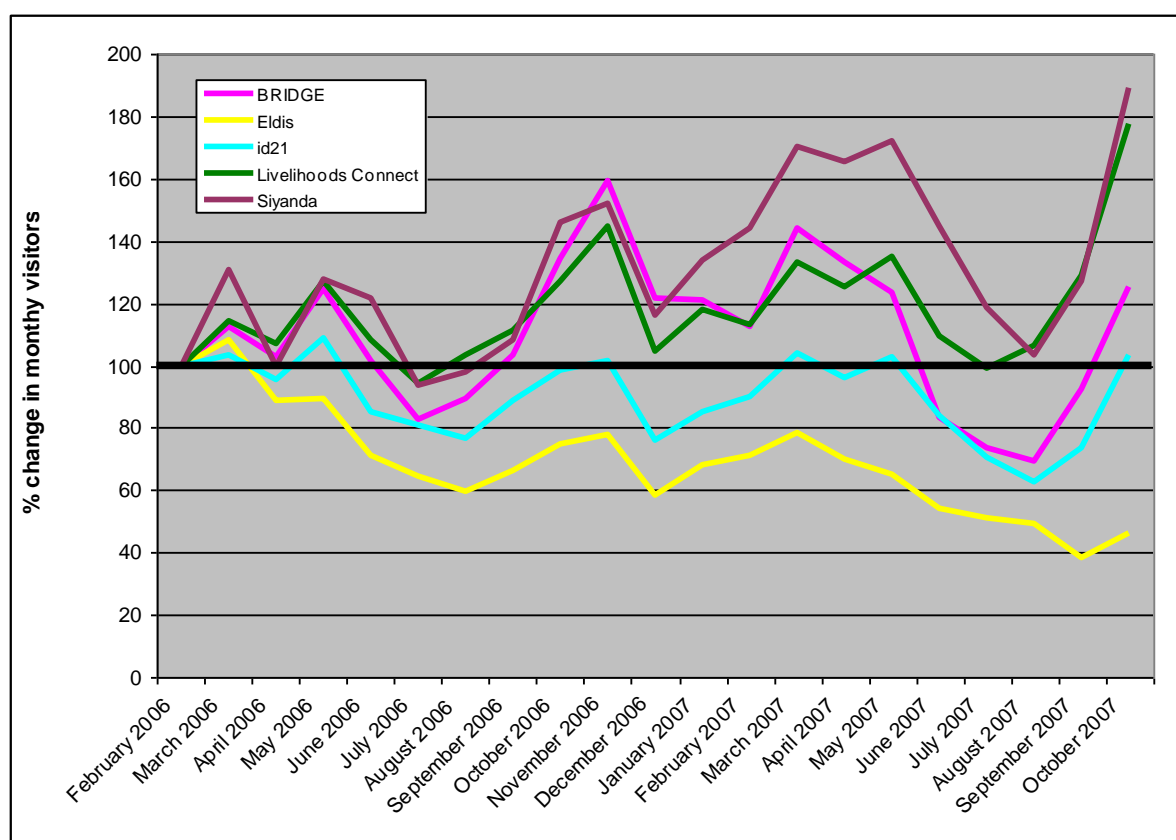
<sup>17</sup> Statistics for BLDS do not count IDS staff or users within the library building.

Table 2. Mean monthly visitor numbers

	2006	2007	% change
<b>BLDS</b>	1,905	3,268	71.5
<b>BRIDGE</b>	13,234	12,748	-3.7
<b>Eldis</b>	99,793	75,555	-24.3
<b>id21</b>	17,460	16,515	-5.4
<b>Livelihoods Connect</b>	15,267	16,835	10.3
<b>Siyanda</b>	7,962	9,946	24.9

Note: Feb – Dec 2006; Jan – Oct 2007.

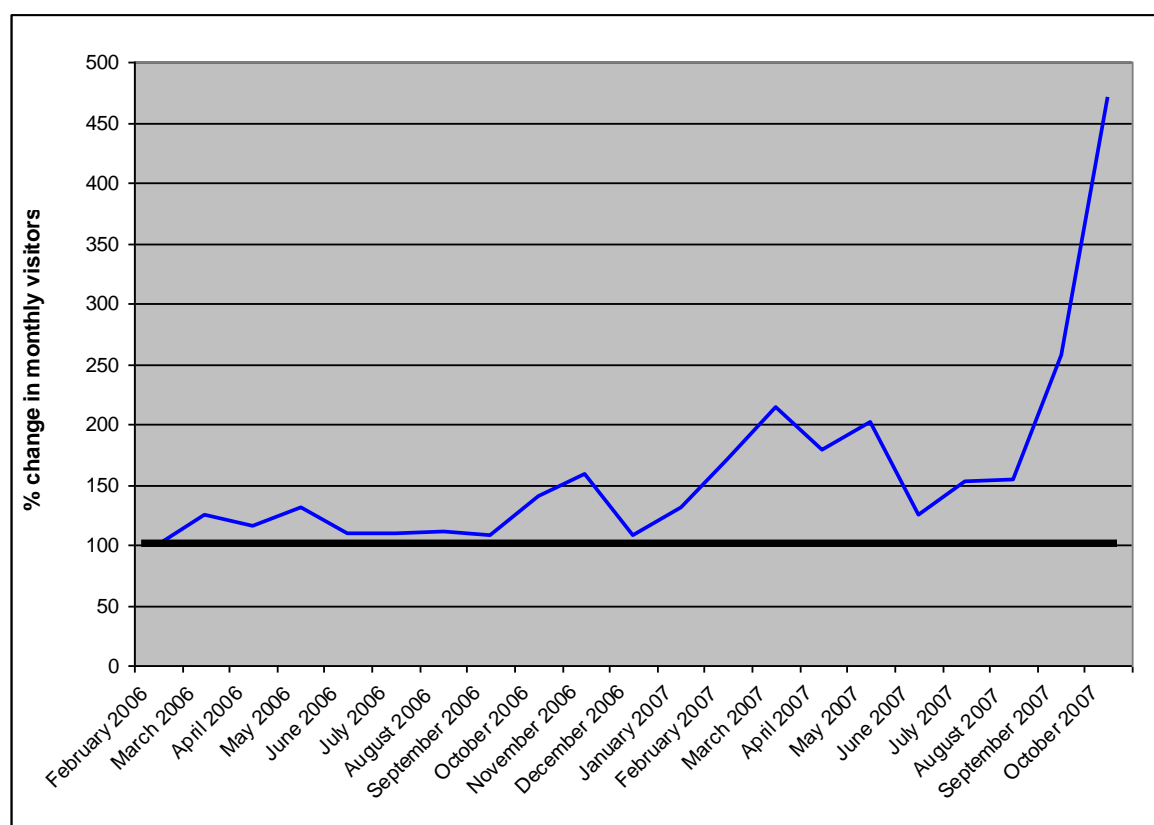
These figures show the wide range of trends across the services, from the 72% year-on-year increase in visitors to BLDS to the 24% decrease in visitors to Eldis. Siyanda and Livelihoods Connect have also shown good growth, while BRIDGE and id21 have been experienced a very slight decline in visitors. These trends become more apparent when month-by-month percentage change in unique visitor numbers are plotted, using the February 2006 figures as a baseline (Figures 2b, 2c). February 2006 is the earliest date for which there are standard figures for all services.

Figure 2b. Unique visitors to the services' web sites, per month (without BLDS)<sup>1819</sup>

<sup>18</sup> Based on IDS' monthly webstats

<sup>19</sup> BLDS on a separate graph as late 2007 increases compress the rest of the graph, losing detail.



Figure 2c. Unique visitors to the BLDS web site, per month<sup>20</sup>

Reasons to explain these trends are not clear. BLDS has been strongly promoting itself, for example to the DFID Research Programme Consortia, it has been promoting its document delivery service, and it has revamped its website. But is this enough to explain a 320% increase in visitors (against the baseline) between August and October 2007? All the services had a upturn since August, but BLDS' is the most extreme.

There are a number of reasons why Eldis' trend is declining. It may be argued that this is due to a change in the way webstats are reported, but the review team understands that ISSEL have factored all the webstats to a common standard, so what affects Eldis should affect all services' figures. There is no evidence that print and CD-ROM media are detracting from web usage. The other factor is that Eldis has been the test service for Oryx, and this has limited its ambitions. However, Eldis has still been producing a reasonable volume of new content, and like BLDS, has had a website revamp. It is suggested that Eldis and SLI should work together to ensure there is a shared understanding of this trend, which if not a data artefact, is worrying.

BRIDGE and id21 have not been Oryx test subjects (yet). They have continued to produce volumes of output roughly in-line with targets. Both services have a high demand for print media, and it is therefore a concern that usage rates are static or in slight decline. This points

<sup>20</sup> Based on IDS' monthly webstats

to a failure of marketing to grow the digital audience for the services, unless the very recent upturn is possibly sustained.

One illuminating indicator from the webstats is the number of repeat visitors over a 12 month period (Table 3).

**Table 3. Mean monthly web site statistics (Mar 2006 – Apr 2007)**

	BLDS	BRIDGE	Eldis	id21	L'hoods Conn't	Siyanda
<b>Unique visitors / year</b>	21,151	223,263	886,237	166,284	153,293	85,126
<b>% repeat visitors in one year</b>	17.2	16.2	20.1	19.5	18.5	16.8
<b>Unique visitors / month (mean)</b>	1,763	18,605	73,853	13,857	12,774	7,094
<b>Visits / month (mean)</b>	1,893	18,605	168,479	28,429	23,549	12,670
<b>Page requests / month (mean)</b>	10,881	30,655	551,144	99,335	52,287	32,425

The definitions of these three parameters are given in Annex 4.

It can be seen that approximately 18% of visitors are repeat visitors over the course of a 12 month period. This may be interpreted in a number of ways:

- i. that 82% of visitors are new visitors, so marketing must be reaching a significant new audience
- ii. that only 18% of visitors are finding what they need, and revisiting the sites.

There are other interpretations, including that this is an artefact due to errors in the way users are identified by the system, and that the periodicity of events when development professionals need new knowledge is greater than 12 months. It is clear that this is an area that SLI should study to try to better understand what the data are showing.

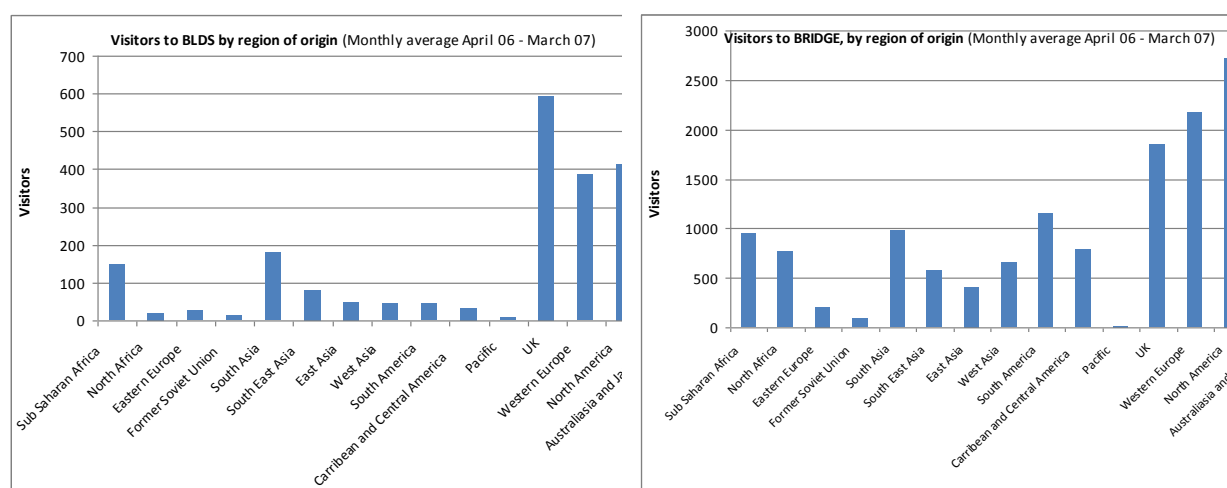
The services have tried to increase their use in the South, and there has been a gradual increase in the proportion of Southern users, ranging from a 2.5% increase from 2005 to 2007 for id21 to a 12% increase for Siyanda (Table 4). It may be that id21 has lower use as its Southern users are catered for by its plain text emails and paper copies of insight, and the largely UK-funding orientation of the research it covers may also be a factor. On a positive note, three of the services (Livelihoods Connect, BRIDGE and Siyanda) now have an average of over 40% of their visitors from the South, with Siyanda and BRIDGE's latest figures around 50%. However,, it is not clear at this stage whether this is a result of their marketing activities, the nature of their subject matter, the type of product or service they deliver, or a combination of these. This is another area for further research in preparation for the next phase,

Figure 3 gives a more detailed breakdown of where users come from. The higher level of use from UK, North America and Western Europe is quite obvious, but the use of BRIDGE, Livelihoods Connect and Siyanda in the South, also shows clearly.

Table 4. Percentage of Unique Southern<sup>21</sup> Visitors<sup>22</sup> to Websites

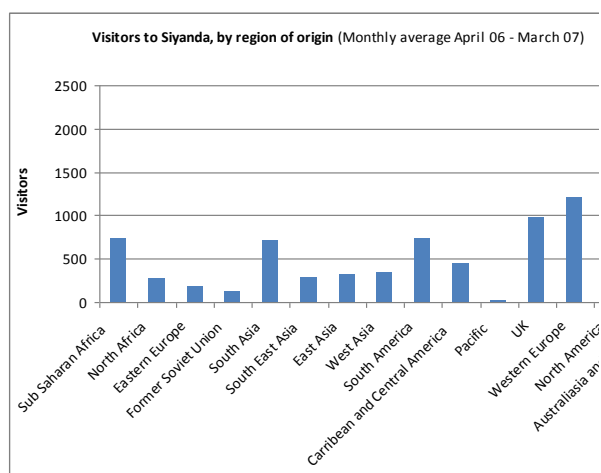
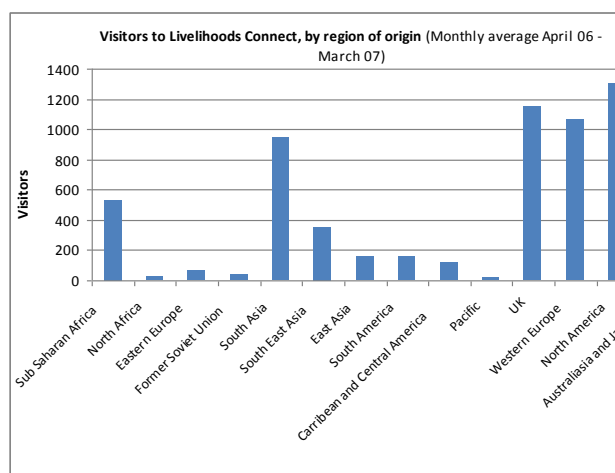
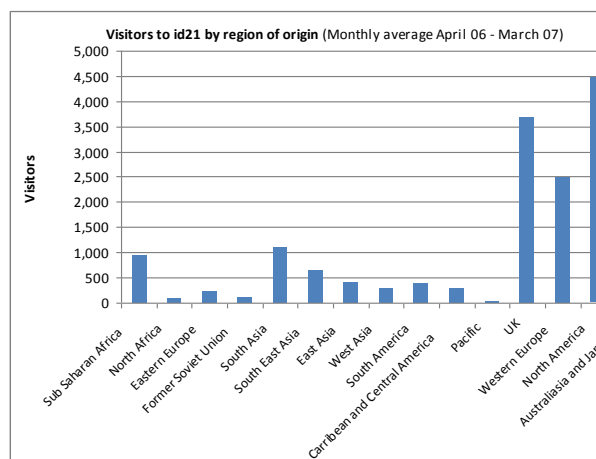
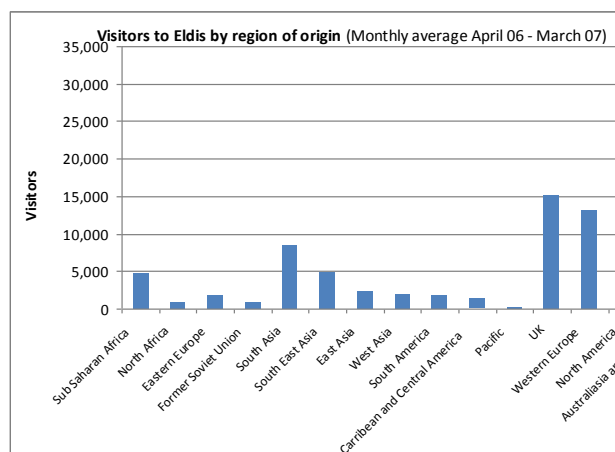
	Apr-05	Apr-06	Apr-07	Mean Feb '06 - May '07
<b>BLDS</b>	..	22.0	29.5	29.6
<b>BRIDGE</b>	38.9	41.8	45.5	47.6
<b>Eldis</b>	24.5	26.4	28.8	31.6
<b>id21</b>	23.5	24.5	25.9	28.5
<b>L'hoods Connect</b>	32.5	35.7	37.4	40.3
<b>Siyanda</b>	38.9	39.1	50.6	48.7

Figure 3. Visitors to the Services, by Region of Origin (July 2007) – different y-axis scales.



<sup>21</sup> 'Southern' includes users from all countries except those in Western Europe and UK, North America, Australasia and Japan

<sup>22</sup> 'Visitor' ('unique user' in ABCE): is a unique computer IP address This is an audience reach metric and helps answer the question 'how many?'. This measurement is not perfect because IP addresses do not always have a one-to-one correlation with computers or people. Visitors will be under-reported because of proxy servers that have many people using the same IP address, and over-reported because of online service providers that have one person using multiple IP addresses. The number of visitors cannot be calculated for the whole time period by adding up the monthly figures as this will double count repeat visitors. Similarly visitor numbers cannot be added up between sites. The total number of unique users over a one year period is calculated separately and given below. The percentage of repeat visitors over a one year period is also given.



### 3.3 The logframe

The review found that with essentially six logframes for the programme – an overarching MK4D logframe and five individual project logframes, there is a surfeit of logframes for a programme of this size. The result of having this many logframes is that each project owns its own logframe and the MK4D logframe is primarily owned by the SLI. This is just for the DFID-funded elements. Other logframes exist for parts of projects funded by other donors. Each project having its own logframe serves as a barrier to integration.

It is therefore suggested that the Information Dept moves to a single Knowledge Services logframe, owned by all the projects. Beneath this, services would still need to have monitorable results frameworks and business plans, and it would not obviate the need for project level M&E. However these could be much simpler documents than a full-blown four tier logframe, and would facilitate M&E and results focus. Importantly, it would also promote the integration of the services towards a common goal – which is having impact on reducing poverty and injustice through providing better access to global common goods on development thinking.

A single Knowledge Service logframe would improve integration within the MK4D bundle, but it is further suggested that a single Knowledge Service logframe is the unified results framework that should be used across all donor funding for the services. This goes hand-in-hand with the recommendation to move to basket funding for all the Knowledge Services across all donors. To take the budget support analogy, if the aim is along the lines of moving to direct budget support to Knowledge Services, then a single logframe would serve the function of a Information Dept 'PRSP' or policy matrix for planning and monitoring purposes.

The logic of the current MK4D logframe does not facilitate an understanding of the projects' relationship with MK4D, nor does it promote objective-oriented planning and management in the way that logframes are meant to. To some extent MK4D was retro-fitted on to the existing services (with Livelihoods Connect being added in later). However, all the projects have re-written their logframes during the period of MK4D, and hence better coherence and logic might be expected.

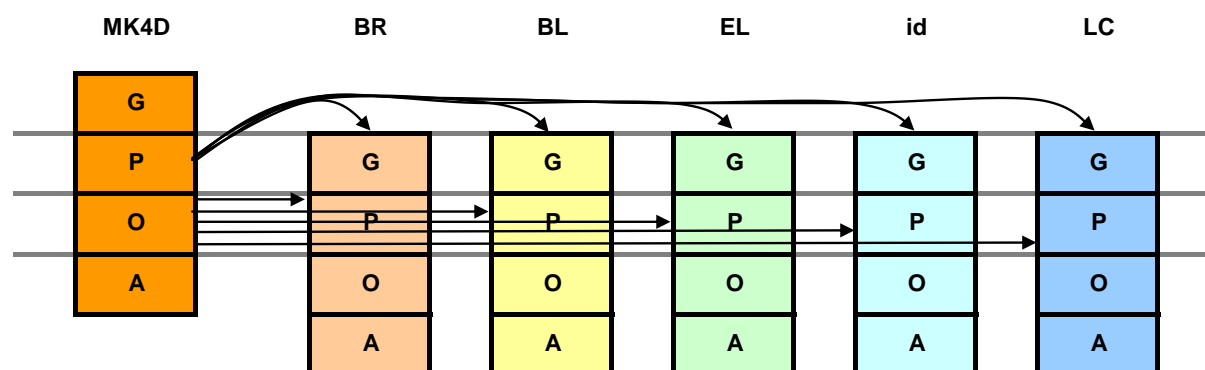
MK4D is essentially a programmatic relationship, with MK4D as the overarching programme umbrella, and the projects, the main programme elements. In this type of set-up, if logframes *were* going to be used at the MK4D and project levels, then a set of nested logframes would be the normal expectation<sup>23</sup>. i.e. a relationship wherein the overarching MK4D Purpose is the projects' Goal statement and MK4D's first five Outputs are the individual Purpose statements of the five projects. One or two other MK4D Outputs may be included, relating to internal and external MK4D functions (eg M&E and marketing). Schematically, a nested relationship would appear as follows (Figure 4) :

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<sup>23</sup> For those who remember it, the design of DFID's Renewable Natural Resources Research Strategy (as captured in the 'Yellow Brick') was based around a set of nested logframes at overall Strategy, separate programme, and project levels.

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Figure 4. Schematic of nested logframes.



i.e a cascaded relationship wherein the project logframes exist at a tier below the MK4D logframe. As it is, the relationship between the MK4D logframe and the five project logframes is confused (see Annex 2 for summary of all logframes):

- MK4D and the five projects all share essentially the same goal<sup>24</sup>. There is no cascade. This infers that MK4D is in fact not an umbrella or bundling project, but a parallel stream of activity beside the five services
- BRIDGE's Purpose is modelled on MK4D's Output 1 ('knowledge gaps bridged...'), or vice versa. In nesting terms, this is how it should be. However, since both logframes have the same Goal statement, this indicates fractured cause-and-effect logic. In BRIDGE, Purpose 'knowledge gaps bridged' contributes directly to Goal 'poverty and injustice reduced...'. Yet in MK4D Output 'knowledge gaps bridged' helps contribute to achievement of the Purpose '...increase...use of...knowledge...', which contributes to the Goal 'poverty and injustice reduced...'. BRIDGE is a two step transformation, MK4D a single step, and this difference shows weaknesses in the overall cause-effect logic.
- Livelihoods Connect's double Purpose statement is classical logframe confusion – having two Purposes is normally considered the basis for two projects.
- There are many other issues with the projects' logframes, but a) this review is of MK4D, b) the projects have already invested a large amount of time on their logframes, and had a logframe training sessions of one to three days, and c) a much simpler approach to logframes and targets is proposed for the next phase.

It is recognised that MK4D was not designed ab initio; in an ideal world, using objective-oriented design, the services' Purpose objectives would have been MK4D Outputs, which would have been designed to deliver, when combined, the MK4D Purpose. As it was, MK4D was retro-fitted to the existing projects.

<sup>24</sup> Eldis' Goal is "better informed decision-making by development policy makers and practitioners" without the "Global poverty and injustice reduced as a result of" clause in front of it.

Nonetheless, it is suggested that a better, nested arrangement would have taken (slightly revised versions of) each of the five project Purposes as an MK4D Output each, and then added a sixth Output relating to internal process to achieve joint working (covering Oryx and management matters, but also M&E to deliver the MoVs), and a seventh Output relating to external processes necessary to achieve joint impact (some capacity building, and mainly marketing).

The other issue regarding the logframe, is the extent to which a) it has been used as a planning and management tool, i.e. as a results framework that is used in decision making to make sure processes and products all help achieve the objectives and targets, or b) it is essentially just a reporting matrix against which things that happen are reported. The nature of the Purpose OVI suggests that, at least at this level, it is a reporting structure only. There is not the evidence that projects have been directed to ensure that 15 Southern based governments, 100 Southern based NGOs, etc are using the services.

### **Objective statements**

The review was tasked with considering possible revision of the Purpose statement. It is not considered that this is necessary for this phase, though a logframe revision is needed for the next .

The MK4D Goal statement ties closely to IDS' mission, and is in step with DFID's goals too: *"Global poverty and injustice reduced as a result of better informed decision-making by development policy makers and practitioners"*. This does not need to be revised.

The current Purpose statement is broad, and so leaves much of its definition to what can be deduced from the indicators. It is suggested that a Purpose along the lines of the definition of Knowledge Translation (see below) might be more explicit, and link more closely to the Outputs (at present the Output to Purpose transformation is a large leap). Also there is the opportunity either in the statement or in the OVIs, to be more specific about which development actors are most important for MK4D. It is understood that the consensus in the Info Dept is that it is moving towards being more explicit about targeting influential and powerful actors. Hence the Purpose statement might be along the lines of: *"[Influential – can qualify actors here, or in the OVIs] development actors incorporate evidence-based information into their policy-making processes and practices [in a timely and effective way]"*

## **4. Relevance**

### **4.1 The role of Knowledge Intermediaries in development**

The name or role of 'knowledge intermediary', or 'info-mediator' is relatively new. A similar function of 'knowledge translation' (KT) has also been identified, particularly in the health sector<sup>25,26</sup>. A simple case for KT has been presented by Choi<sup>27</sup>, and is relevant here:

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<sup>25</sup> Its definition might be useful when thinking about the Purpose of the next phase of MK4D: Knowledge Translation is: "the effective and timely incorporation of evidence-based information into the practices of health professionals in such a way as to effect optimal health care outcomes and maximize the potential of the health care system." Knowledge Translation Program, University of Toronto.

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*“Two problems dictate why scientific knowledge needs to be translated for decision makers. The first problem is volume. Scientific findings are being published all the time. For example, there are some 17,000 new biomedical books published every year, along with 30,000 biomedical journals, resulting in an annual increase of 7%. As a result, decision makers such as physicians need to read on average 19 original articles each day to keep abreast of their field. The second problem is complexity. Many of these studies use complicated designs, high power statistics, and technical jargons, which are not readily understood by people outside the field.”*

The Info Dept deserves due credit for its proactivity in conceptualising and promoting this role of knowledge intermediaries in development, for example through the workshop on research communications hosted at IDS in 2006.<sup>28</sup>

At this workshop, it was agreed that knowledge intermediaries such as the IDS Information Department have a number of intrinsic advantages when it comes to communicating research, particularly in terms of critical mass:

- “They can bring together the **specialist skills and capacities** needed to handle research information well and develop a professional service.
- They can bring together a **wide range of material** in one place, providing the breadth, depth and consistency of coverage that individual research institutes cannot match, and helping to put research material in context. This can be a big benefit to users who are looking for information on a topic and are unsure where to start, or lack the time to scan dozens of different sources.
- By establishing a **trusted brand**, they can lend credibility to the research they feature. This is particularly important for small organisations, not least in developing countries, that are working to build up their reputation and profile.
- They can provide a degree of **independence** that users may find valuable, bringing together material from different sources and contrasting the conclusions from different studies to help users come up with a balanced view.
- They can help to provide **continuity** in the longer term, given that research projects come and go, and often have difficulties maintaining communication efforts after the project has finished.”

Thus the role of MK4D is an important one, a recognised component of the chain from research generation of information to policy formulation modified practice. It is generally recognised that researchers are not the best communicators of their own findings, and that specialists who can summarise and provide well packaged communications are a necessary complement to the research. MK4D is thus serving a relevant role in the development process and should continue to be funded.

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<sup>26</sup> Schryer-Roy (2005)

<sup>27</sup> Choi, B.C.K. (2005). Understanding the basic principles of knowledge translation *J. Epidemiology and Community Health*. 59:93

<sup>28</sup> Geoff Barnard, Liz Carlile and Deepayan Basu Ray (2007). *MAXIMISING THE IMPACT OF DEVELOPMENT RESEARCH. How can funders encourage more effective research communication? FINAL REPORT*. Based on a Workshop held at the Institute of Development Studies, 16–18 October 2006. IDS, Brighton.



## 4.2 Responsiveness to (target) users

The OECD DAC definition of relevance is “The extent to which the aid activity is suited to the priorities and policies of the target group, recipient and donor”. Therefore, has MK4D been appropriate to the priorities of both DFID and the services’ users?

**DFID** is strongly committed to development research, as described in its Research Funding Framework<sup>29,30</sup> (which is currently being updated): “New science and ideas are crucial for the achievement of the Millennium Development Goals, but global research funding is insufficient to match needs. Many innovations require an international scale of research effort. DFID’s Central Research Department commissions research to help fill this gap, aiming for tangible outcomes on the livelihoods of the poor.” The Framework singles out “the need to link research with the take-up of ideas, so that results made a difference to the poor.”

The Communications paper commissioned for the Research Framework<sup>31</sup> recommended DFID address the following objectives as part of its research strategy:

At **international** level:

### Objective One: Increasing the volume of useful research information available

- Strengthen existing and new mechanisms to improve the flow of appropriate research information.
- Improve research knowledge management, communication and dissemination systems within DFID.
- Sift and market new research information through appropriate mechanisms.
- Support global initiatives to create and promote standards for electronic information management.
- Stimulate the development of a single electronic portal through which all DFID and other donor-funded research can be accessed.

### Objective Two: Creating an enabling environment for research uptake

- Support collaboration with other organisations to promote a more systemic approach.
- Create international fora and networks for the improvement of research communication.
- Expose policy makers to emerging research results with policy implications for poverty eradication.

At **national** level:

### Objective One: Increasing the volume of useful research information available

- Provide support in partnership with DFID country offices to synthesise and disseminate country sponsored research, support in-country communications strategies, ensure all DFID-funded research activities include an appropriate communications strategy.

<sup>29</sup> DFID (2004). *Research Funding Framework 2005 - 2007*

<sup>30</sup> The research budget was over £100 million in 2006/07 and the Third White Paper further doubled the level of funding to research, and the desire for evidence-based policy making is seen in the merging of the research and policy divisions in DFID Headquarters.

<sup>31</sup> Dodsworth, Smith, et al (2003). *New DFID Research Strategy Communications Theme*. Final report. CIMRC/DFID.

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### Objective Two: Creating an enabling environment for research uptake

- Provide support in partnership with DFID country offices to expose policy makers to emerging research results; ensure all DFID-funded research programmes engage users and policy makers; help identify national processes which could strengthen research effectiveness; undertake action-research projects.

It is considered that MK4D is highly relevant in addressing these objectives and meeting DFID's aims for improving the use of research results and new information in the processes of poverty reduction. id21 directly communicates DFID-funded research, and the other services communicate DFID funded research as well as that from many other organisations to create global public goods for research information for development<sup>32</sup>.

**Users:** In regard to assessing its relevance to its users, the user base must first be identified. This then requires an answer to whether it is actual users or target users that are most important here. For reasons related elsewhere, the nature of the services, especially the web and email bulletin services, means that the total population of actual users is not well identified. Thus, much of the information about user populations is extrapolated from sample surveys. An example of user identification comes from Eldis' Bios analysis, which says Eldis "is a very well-used service, with .....visits every month and ....downloads etc. At the same time, because Eldis has not targeted specific user groups or countries, less has been known about who uses the service, the particular contexts in which they work and the ways in which Eldis contributes to their development goals."

This review asked the services to identify their top ten target audiences, in terms of people serving particular functions in different types of organisation. The results are presented in Annex 5, which shows that, in order of priority, MK4D's target organisations are: Southern NGOs, educational organisations, research organisations, Southern governments, DAC development agencies, and multi-lateral development agencies. The target roles in these organisations are: research, advisory, practical action, and advocacy.

How does this match with actual usage?

The current usage pattern shows the employment profile of Eldis users to be composed of<sup>33</sup>: NGOs, 24%; Research/teaching, 22%; Individuals, 11%; International organisations, 10%; Consultants, 9%; Government, 9%; Commercial business, 3%, Bilateral aid agency, 2%, Media, 2%. Usage by government and bilateral agency officials appears lower than the intended priority of these organisations.

Respondents to a Livelihoods Connect survey were as follows: Academics - 20.2%, International NGO - 16.9%, NGO - 11.2%, Government - 7.9%, Multilateral - 5.6%, Bilateral - 3.4%, Commercial - 3.4%, Network - 1.1%, Other - 23.6%.

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<sup>32</sup> In regard to DFID and other donors, it is worth noting that each year BRIDGE offers twenty days of desk-based research time to each of its core funders. In 2005, as part of Sida's allocated research time, Sida used the "Funders Helpdesk" and asked BRIDGE researchers to write a paper to inform the Sida Moldova country strategy on Gender and Migration.

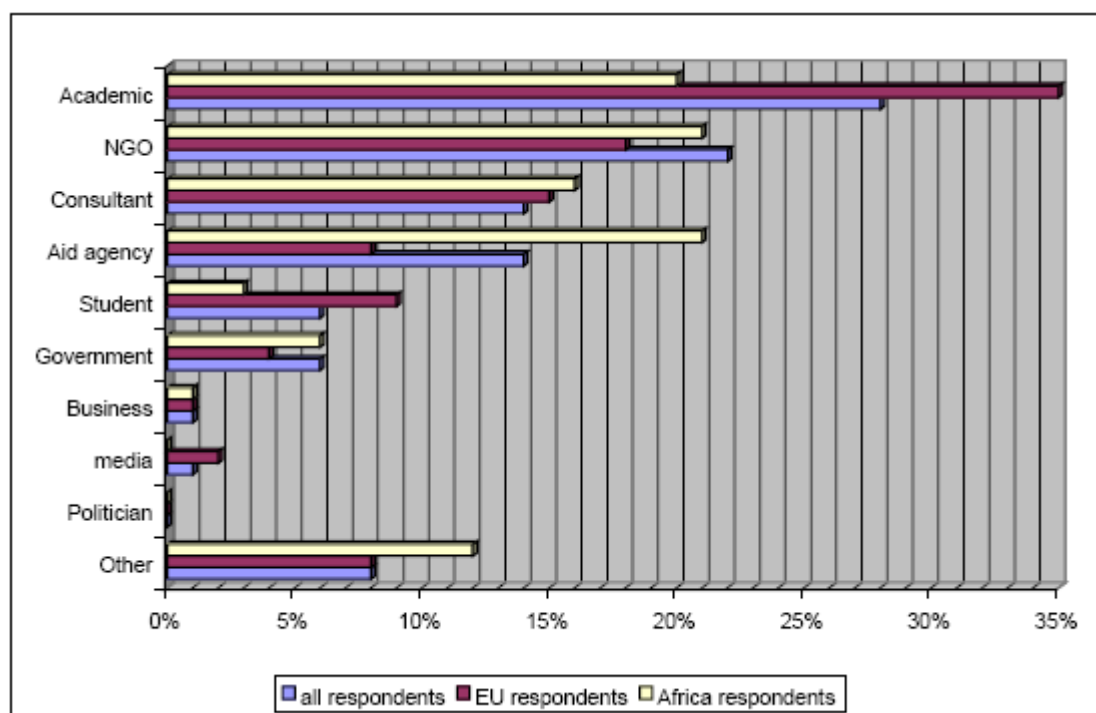
<sup>33</sup> Eldis self-evaluation (2007)

id21 has identified its target users as including:

- advisors in international /intergovernmental development agencies and donor bodies
- functionaries attached to national ministries of health, education, labour and the like
- policy reformers, campaigning private voluntary organisations and pressure groups
- financial journalists and social affairs correspondents in print and broadcast media
- field managers in non governmental rural and urban development or care agencies
- commercial developers, trade unionists, corporate lawyers and investment funds

However, this also contrasts with what survey finds to be its actual user base: id21's actual users comprise the following<sup>34</sup> (Figure 5):

**Figure 5. id21 - types of user (survey data)**



Here also, there is a gap between the stated target audience and the actual audience. Overall, the services appear to not be hitting Southern government users as well as is necessary to fulfil their aims. Therefore in relation to assessing relevance to target users, government users' views are probably underrepresented in the services' own surveys, as well as those conducted specifically for this review<sup>35</sup>.

MK4D has targets to specifically have the services used by Southern organisations, and the services have targets for increasing Southern use of different products, and the services are indeed moving towards increased use from the South. As seen above (Table 4), between 28% and 39% of website visitors are from Southern countries. The country studies are therefore

<sup>34</sup> Jim Coe, Mark Luetchford, and Tess Kingham (2002) *id21: tracking routes towards impact*.

<sup>35</sup> Though it is possible that this may be also explained to a greater or lesser extent if government audiences are less likely to respond to surveys.

useful to understand a little more about relevance, and the factors that determine relevance or otherwise:

In Tanzania, respondents said Eldis content is well summarised, current, very topical, well selected, interesting and relevant to development work. An academic respondent said some of the content is research-based and on Tanzania, making it good material for his teaching and research. He thus found content different from other internet sources where one spends time to identify what is relevant.

In Malawi, the study found that “all users appreciated Eldis for the broad range of development issues/topics it covers. Despite the diversity of users, virtually everyone could find some materials relevant to their work on Eldis: from poverty alleviation, to health, HIV and AIDS, agriculture, food security and the environment. The consistency of Eldis in covering specific topics is allowing users to monitor trends on a particular issue. IDS Knowledge Services are also appreciated for being current. BRIDGE publications are up-to-date on gender and HIV and AIDS. Most users place special value to material that is 0-24 months old. Anything older was considered ‘outdated’.” Most users also appreciate the fact that they can access not only summaries but also full-text journals and articles free of charge through Eldis. In relation to content, over 90%<sup>36</sup> of respondents in Malawi felt that the level of the technical content is “about right”, and 64% of respondents said that ‘most’ of the services content (especially Eldis’) was relevant and appropriate to their work. 21% said that ‘little’ was relevant, but these were specialist technical advisers, eg in government.

Niche targeting does however work for the other services. In the web survey, of Livelihoods Connect, respondents said: *“Simply the best livelihoods related website, frequently up-dated and provides the most dependable source of information on various aspects of livelihood support”* and *“The best source of info world-wide on livelihoods and people-centred approaches.”* In regard to BRIDGE, a Bangladesh country study respondent said: *“BRIDGE provides a first cut on many issues, information on new research, an overview on latest thinking on the subject. It is not very in depth for academic purposes but it definitely gives a handle on the issues making it even more relevant to practitioners and even policy makers rather than researchers and academics”*.

Other comments on relevance were offered in asking about the services’ strengths and weaknesses (Table 5):

**Table 5. Strength and Weaknesses of services – Malawi country visit<sup>37</sup>.**

Strengths	Weaknesses
Eldis	
1. Open site, no registration	1. Not marketed well enough, not many know the services (e.g., flyers and post cards not distributed widely)
2. Free access to full text journals	
3. Eldis CDs have broad package, replace “mountains” of books, are handy (portable) for those who travel a lot and those without	2. Not as detailed in terms of national statistics as other local information sources (e.g.

<sup>36</sup> Note, the country studies had small sample sizes.

<sup>37</sup> Comments on BLDS and Livelihoods Connect were not tabulated in the Malawi report.

Strengths	Weaknesses
high speed internet 4. Consistency of topics, can follow-up issues over time 5. Topics are arranged logically and systematically thus facilitating accessibility 6. Rich in Malawi knowledge, let alone Africa as a whole 7. Broad, not sector/institution -specific and provides links to related sites - so it is deal forum for NGOs to share experiences 8. One-stop shop at the click of a button – the most resourceful site in terms of database on different types of development information 9. More-or-less a gateway (e.g., for accessing information on HIV and AIDS for a particular country) 10. Most information is on poverty reduction and hence very relevant to Africa	FEWSNET) 3. Alternative products are needed for those with no access to computers (e.g., in government) 4. Feedback mechanism is weak 5. CDs distributed in limited quantities, does not promote wider sharing 6. Site heavy on graphics and materials not easily downloadable in slow internet environments 7. Materials are NGO heavy, certain NGOs may dominate certain subjects (e.g., Oxfam on EPAs), resource is less balanced with materials from other commentators 8. IDS is sometimes slow to respond to requests for information made by first time users (up-to 3 months delay) 9. Little coverage of human rights in general, yet rights is a cross-cutting topic for most topics
BRIDGE	
1. Can review summaries and if interested download full reports 2. Quite attractive site, user friendly 3. Materials “ <i>touch the very heart of women</i> ” (relevant) 4. Information is current	1. Issues of Migration and trade are not in the mainstream of most people: key topics are vulnerability; HIV and AIDS impacts; women and child rights; etc
id21	
1. Diverse topics on development 2. Published frequently (10x per year) 3. Articles are received at the right time	1. Publications too small, loose and easy to lose when not immediately filed 2. Does not use the CD facility to put together a collection of <i>id21 insights</i> , for ease of handling by users (so that they are not bulky)

One measure of relevance is how much people value the service – i.e. contingent valuation<sup>38</sup>. In Malawi, 64% of respondents said they would contribute to the cost of the service, ranging from \$7 to \$150/year, with an average of \$49. In Tanzania, respondents said they would pay \$10 - \$200 as an annual subscription to Eldis. One individual was very specific, saying he would pay personally for CDs: US\$10, and US\$ 1 for each newsletter (id21 rural development & natural resources). Another individual was very interested to maintain access to online Eldis, for which he would pay US\$ 36 per year.

The proportion of Southern content has been a preoccupation for the services. This is considered to affect relevance to target audiences, and the evidence from the country studies

<sup>38</sup> This is not a suggestion that the services should become paid-for services, but is rather a measure of how much users value them. It is considered that requiring payments from individuals for the services would reduce their relevance to several of the key target audiences. Payment for corporate use may be an avenue to pursue, but this would be better as a contribution to basket funds rather than pay per use.

is that users are indeed concerned about this. In Malawi, half of respondents considered that information emanating from the South is “well covered”, but 29% felt it is “not well covered”. In Bangladesh it was found that certain topics, such as trade in South Asia, are not sufficiently covered. *“In fact the general feedback was that it is necessary to increase the information from south and south east Asia”*. In Tanzania, a similar message was found: *“More authors from the South should be included to enrich and balance development issues”*. However another respondent did say *“As an international source, Eldis has tried to cover the South; there is plenty of information from the South ... actually more information from the South than the North, which is a credit to IDS”*, and a third said: *“Eldis should have a link to Tanzania online and other development gateway. It should also include governance, democracy, public expenditure tracking and anti-corruption literature”*. Therefore relevance would be improved if MK4D continues to emphasise Southern content.

The **formats** in which the services deliver their information are a further factor affecting relevance. A range of paper and digital formats are used, either as products that are distributed to registered users, or as websites for open browsing. The country and web surveys show that while on-line services are the most popular, print media continues to be important (Table 6) :

**Table 6. Preferred sources of information (Percentage of responses, from country study samples)**

	Malawi	Tanzania
On-line	41	49
Print	23	22
Face-to-face	16	11
CDs	15	10
Broadcast	5	9.5
N	14	7

Interestingly, the results from the web survey, where the respondents were drawn more from the North, are quite similar (Table 7):

**Table 7. Scoring of usefulness of information sources – web survey**

Sources	Very Useful	Useful	Not Useful	Not used at all
Internet searches	27	8	1	0
Face-to-face contact (friends, colleagues)	21	14	1	0
Paper-based sources (journals, newsletters)	18	17	0	0
News feeds/email bulletins	8	25	2	0
Other	1	14	2	3
CD-ROMS	3	17	7	4
Radio & TV	3	15	10	4

(n max = 36)

Thus MK4D services are maintaining relevance through production of a range of products, and should continue to do so. Respondents felt that in five years time they would be making more use of the internet for finding development information, but not exclusive use.

Table 8. Top 25 referring sites for each service: April 2006 – March 2007.

BLDS		BRIDGE		Eldis		id21		Livelihoods Connect		Siyanda	
Referring sites	Visits	Referring sites	Visits	Referring sites	Visits	Referring sites	Visits	Referring sites	Visits	Referring sites	Visits
www2.ids.ac.uk	10,375	Google	140,345	Google	752,911	Google	138,728	Google	168,977	Google	62,453
www.eldis.org	2,926	MSN	2,987	Yahoo	63,167	www.eldis.org	9,025	MSN	2,973	Yahoo	2,668
www.ids.ac.uk	1,741	www.ids.ac.uk	1,959	www.eldis.ids.ac.uk	10,812	Yahoo	3,404	Yahoo	2,397	www.genie.ids.ac.uk	1,423
Google	682	www.siyanda.org	1,908	Ask Jeeves	34,763	Ask Jeeves	3,240	www.ids.ac.uk	1,356	www.bridge.ids.ac.uk	1,723
66.249.93.104	76	Yahoo	1,567	eldis.org	10,136	MSN	2,446	www.eldis.org	1,188	MSN	1,084
www.bibliothek.uni-regensburg.de	77	www.eldis.org	1,204	www.dfidhealthrc.org	6,115	Search.com	1,736	Ask Jeeves	856	www.eldis.org	1,126
library.open.ac.uk	68	AOL	866	www.ids.ac.uk	16,599	www.ids.ac.uk	1,591	World Bank	760	www.ids.ac.uk	675
www.gdnet.org	53	Ask Jeeves	724	MSN	15,334	www.globalissues.org	1,106	Search.com	747	www.genreenaction.net	841
64.233.179.104	49	Search.com	664	community.eldis.org	11,231	www.ifat.org	522	www.rambler.ru	564	Ask Jeeves	696
72.14.203.104	41	www.lemmefind.co.uk	436	Search.com	14,027	www.gdnet.org	708	www.ifad.org	411	www.internationaldonors.org	559
www.nou.edu.ng	39	www.womenwarpeace.org	366	members.tripod.com	11,251	World Bank	593	AOL	409	Search.com	525
AltaVista	21	www.genreenaction.net	249	www.actionaid.net	9,890	America Online (AOL)	545	www.oxfam.org.uk	370	www.un-instraw.org	387
72.14.209.104	29	www.awid.org	298	mailserver	2,954	www.pambazuka.org	384	www.odi.org.uk	344	AOL	345
72.14.235.104	30	www.un-instraw.org	260	search.jhmi.edu	8,720	uk.oneworld.net	455	www.answers.com	326	www.gwob.net	375
216.239.59.104	29	www.bridge.ids.ac.uk	63	www2.ids.ac.uk	7,601	searchenglish.britishcouncil.org	396	www.mande.co.uk	322	www.itrainonline.org	321
66.102.9.104	24	www.soso.com	261	en.wikipedia.org	8,338	www.dfid.gov.uk	332	en.wikipedia.org	316	www.umbc.edu	276
cc.msnsnscache.com	18	www.answers.com	237	infoserve.blogspot.com	1,562	www.comminit.com	259	www.fao.org	286	www.nativeleaders.org	181
209.85.129.104	23	search.live.com	196	www.sadashivan.com	6,485	www.business-humanrights.org	296	www.migrationdrc.org	249	www.siyanda.org	89
209.85.135.104	18	search.mywebsearch.com	183	www.gdnet.org	3,903	www.livelihoods.org	253	search.mywebsearch.com	245	search.mywebsearch.com	143
www.sul.stanford.edu	22	www.unpac.ca	169	www.thewellproject.org	6,756	www.unesco.org	160	buscador.terra.com.br	243	www.awid.org	141
64.233.161.104	23	www.gdrc.org	153	www.forestry.co.za	6,136	www.choike.org	222	search.live.com	193	www.mande.co.uk	105
64.233.183.104	22	research.umbc.edu	168	www.nfi.net	4,487	topics.developmentgateway.org	236	de.ryerson.ca	155	www.genderatwork.org	104
72.14.221.104	20	portal.unesco.org	160	www.careerframes.com	5,705	www.answers.com	223	www.accd.edu	212	www.apc.org	113
72.14.253.104	18	www.aucegypt.edu	160	iicd-srv02	1,913	www.lshtm.ac.uk	162	community.eldis.org	74	www.bloglines.com	30
72.14.205.104	18	www.acdi-cida.gc.ca	121	www.infoserve.blogspot.com	799	Dogpile	194	www.asianet.fi	156	66.249.93.104	59

## KEY

Google &amp; Search.com meta-engine

Other major search engines

IDS cross-referrals

MK4D service donors

Comparator services

Wikipedia

Note: these numbers relate to the number of visitors who arrived at the MK4D sites by being referred into them from another site, which is the one lists here. The number visitors who came direct to the services' sites is not included.

Table 9. Top 25 referring organisations for each service: April 2006 – March 2007.

BLDS		BRIDGE		Eldis		id21		Livelihoods Connect		Siyanda	
Referring organisations	Visits	Referring organisations	Visits	Referring organisations	Visits	Referring organisations	Visits	Referring organisations	Visits	Referring organisations	Visits
www.2ids.ac.uk	10,375	www.ids.ac.uk	1,959	www.eldis.ids.ac.uk	10,812	www.eldis.org	9,025	www.ids.ac.uk	1,356	www.genie.ids.ac.uk	1,423
www.eldis.org	2,926	www.siyanda.org	1,908	eldis.org	10,136	www.ids.ac.uk	1,591	www.eldis.org	1,188	www.bridge.ids.ac.uk	1,723
www.ids.ac.uk	1,741	www.eldis.org	1,204	www.dfidhealthrc.org	6,115	www.globalissues.org	1,106	World Bank	760	www.eldis.org	1,126
library.open.ac.uk	68	www.womenwarpeace.org	366	www.ids.ac.uk	16,599	www.ifat.org	522	www.ifad.org	411	www.ids.ac.uk	675
www.gdnet.org	53	www.awid.org	298	community.eldis.org	11,231	www.gdnet.org	708	en.wikipedia.org	316	www.internationaldonors.org	559
www.gdrc.org	12	www.un-instraw.org	260	www2.ids.ac.uk	7,601	World Bank	593	www.fao.org	286	www.un-instraw.org	387
www.siyanda.org	7	www.gdrc.org	153	en.wikipedia.org	8,338	www.pambazuka.org	384	www.migrationdrc.org	249	www.itrainonline.org	321
www.studying-development.org	5	portal.unesco.org	160	www.gdnet.org	3,903	searchenglish.britishcouncil.org	396	community.eldis.org	74	www.nativeleaders.org	181
www.hero.ac.uk	6	www.unescobkk.org	115	www.thewellproject.org	6,756	www.dfid.gov.uk	332	www.id21.org	142	www.awid.org	141
www.kingston.ac.uk	5	www.genderandaids.org	104	www.lse.ac.uk	4,386	www.business-humanrights.org	296	www.migrationpolicy.org	132	www.genderatwork.org	104
www.soas.ac.uk	4	www.unifem.org	109	www.drylands-group.org	2,429	www.livelihoods.org	253	www.eldis.ids.ac.uk	120	www.apc.org	113
elibrary.lse.ac.uk	4	library.open.ac.uk	110	www.internationalwildlifelaw.org	2,693	www.unesco.org	160	www.chronicpoverty.org	110	www.penelopes.org	78
lms.kingston.ac.uk	1	www.fao.org	104	www.kenyaaidsinstitute.org	2,118	www.choike.org	222	www.economicsnetwork.ac.uk	97	www.unitar.org	34
ltssolweb1.open.ac.uk	4	www.undp.org	93	www.consumersinternational.org	1,572	topics.developmentgateway.org	236	www.rdiland.org	81	www.icw.org	85
metalib.brad.ac.uk	3	genero.bvsalud.org	108	www.eadi.org	1,413	www.lshtm.ac.uk	162	www.innovation.ex.ac.uk	80	www.apcwomen.org	51
www.iisd.org	4	OECD	97	www.pambazuka.org	1,434	www.ruralpovertyportal.org	191	www.samuha.org	76	www.thewellproject.org	66
evidencenetwork.org	3	www.beyondintractability.org	72	www.fiuc.org	130	www.sussex.ac.uk	182	www.cbnmasia.org	69	www.pambazuka.org	55
www.developmentinpractice.org	3	blds.ids.ac.uk	60	www.palmerini.org	1,696	www.volunteeringinafrica.org	174	www.cipotato.org	63	www.whrnet.org	46
www.econ.cam.ac.uk	3	topics.developmentgateway.org	74	www.euforic.org	1,577	www.tanzaniagateway.org	133	www.iied.org	46	www.realising-rights.org	34
www.lib.strath.ac.uk	3	UNICEF	69	www.un.org	1,449	www.chronicpoverty.org	134	www.sariq.org	45	www.womenlobby.org	48
www.livelihoods.org	3	w3.whosea.org	72	nt1.ids.ac.uk	319	www.iansa.org	127	www.enterweb.org	63	www.wougnet.org	39
www.pnet.ids.ac.uk	3	www.id21.org	71	www.linkingclimateadaptation.org	876	www.thedialogue.org	115	www.onefish.org	58	www.genderandaids.org	38
hdr.undp.org	2	www.onlinewomeninpolitics.org	58	www.acaint.org	888	www.literacyonline.org	108	www.un-instraw.org	43	topics.developmentgateway.org	34
intranet.ceip.org	2	www.americalatinagenera.org	51	www.devdir.org	653	www.cgdev.org	108	www.yesweb.org	47	www.dfidindia.org	33
student.kingston.ac.uk	2	www.livelihoods.org	58	www.storytellerfilms.org	78	www.development-ethics.org	78	earthtrends.wri.org	47	community.eldis.org	6

## KEY

IDS cross-referrals

MK4D service donors

Comparator services

Wikipedia



Users mainly reach the websites from search engines, but there is more cross-service navigation that would be indicated from the interviews (Tables 8 and 9). The World Bank, UN agencies and some NGOs also feature as important referring sites. UK academia is an important referrer for BLDS. DFID only features as a referring site for id21 – this points to a possible opportunity to improve marketing into DFID itself, through both DFID's *Insight* intranet and the main website. Though it should be noted that: *"DFID staff are not the main focus for any of the services, all of which aim to reach out to a global audience, especially those based in the South. The case for DFID supporting them is therefore primarily a "global public goods" argument, rather than to serve specific DFID knowledge needs."*<sup>39</sup>

The websites are generally seen as easy to use (especially the new Eldis and BLDS sites), and pass tests of good websites<sup>40</sup>, including simple return to home, accessible search function, and operational with pictures switched off (Livelihoods Connect fails this test). All the sites, except Livelihoods Connect have an easily accessed site map and a 'contact us' page (though no one-click feedback option). BLDS and Livelihoods Connect both feature help desk functions.

In the web survey, respondents said of Livelihoods Connect: *"the front page is confusing and doesn't encourage me to search it"*, of id21: *"ID12 [sic] [bulletin] could come in a more attractive format, although I realise it is probably text only to make it more accessible for people with slow connections"*, and of Eldis, *"The most user friendly of all the sites"*. The Malawi country study recommended to: *"Design a user interface that is friendlier to users in low speed internet environments or also support internet connectivity activities for government departments and local NGOs that house information centres"*. In Bangladesh, a respondent said *"I visited the Eldis site after a period of time and was pleasantly surprised to find it being organised better with much more material put together in a good design. The list of documents were much more comprehensive tat most of the sites I know and the listing of topic on the first page allows the user to drill down to his area of interest quite quickly"*. Thus it would appear that the new Eldis site encourages use, but both id21 and Livelihoods Connect could do with updating to stay relevant to users' expectations. However this needs to be done in a way that does not demand high band width.

Not all users have good, or even any, access to the internet. In Bangladesh, slow internet connections make it difficult for individual users to access net-based services, even though they find them valuable. Downloading files is slow and intermittent connections make the whole exercise frustrating. Therefore those in offices with broadband connections are likely to use the knowledge services much more than those working in their individual capacity. Those users who received CD ROMs have found it easier to share information with colleagues. The librarians at the ICDDR-B<sup>41</sup> library, as well as British Council, believed that CD ROM versions are more useful in further disseminating the information. Smaller NGOs felt that if they were allowed to copy the CD ROMs, then they can make this information available to field offices across Bangladesh.

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<sup>39</sup> MK4D Proposal (2005)

<sup>40</sup> INTRAC. (2001) *Evaluating Websites*. NGO Policy Briefing Paper No. 5.

<sup>41</sup> International Center for Diarrhoeal Diseases Research -Bangladesh

Similarly, in Tanzania, the CEO of an NGO reported that he was very familiar with Eldis but the CD version is more relevant to him because the online version requires internet facilities which are not easily available.

In regard to other products, in Bangladesh, users said they receive bulletins and alerts from the IDS sources, which they scan carefully for information of interest and need. If they find anything of special interest in the bulletins they try to read the complete report. But they admit that they often are hard pressed for time and do not end up reading the entire article or report. Therefore the summary in the bulletin is key to motivating users to look up relevant information. Bulletins and alerts appear to be more regularly consulted rather than the online searches (an access issue).

One other pertinent sets of comments from the country studies related to feedback and responsiveness. Respondents suggested that there is an improvement to the current supply of CD-ROMs, especially to new users who request for the first time. *“The turn-around time for registration should be shortened as information is only as good as it is timely.”* Furthermore, *“IDS should strengthen or put in place system for getting feedback and suggestions from users of its information products. IDS could form advisory boards at national level to create the feedback loop.”*

The services are seen to be relevant, but the surveys show that they could be both better marketed and more relevant. It is suggested that a closer engagement with Southern individuals, groups and partners might address these points. This is discussed in depth in the Recommendations and Conclusions; Southern partners could add to more targeted marketing, could improve the level of Southern content, and would increase the level of interactivity with users – something that information communication research indicates is important in improving effectiveness.

## 5. Effectiveness and Efficiency

### 5.1 Bundling

The concept of bundling the then four, now five, services together under MK4D was predicated on cases made by both DFID and the Information Dept. These are captured in the MK4D proposal document. The case made to DFID for bundling was that it would deliver to them the following benefits:

- “Encourage greater cohesion between different services, reduce potential duplication of effort and maximise the impact of DFID’s investment.
- Simplify contractual arrangements and reduce management transaction costs.
- Underline DFID’s commitment to supporting this kind of knowledge sharing work, helping DFID to “lead from the front” in mobilising international efforts in this area.”<sup>42</sup>

The Information Dept saw bundling as having these following advantages for the services:

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<sup>42</sup> MK4D Proposal (2005)

- “Provide an incentive and an ability to develop synergies between our services, which has in the past been constrained because of their separate project funding streams.
- Offer the flexibility to develop new cross-cutting areas of work and push the boundaries of what we can achieve.
- Create a more cohesive approach to managing IDS information services.
- Provide a more secure financial base for this set of services which will allow us to plan and work more strategically.
- Achieve cost savings and/or efficiency gains by pooling skills and resources, especially in developing a new shared technical platform, “Oryx”.’<sup>43</sup>

A detailed case for more joined up working was also made in the paper/presentation “*Maximising the impact of IDS Knowledge Services*”<sup>44</sup>. This states that:

- “The new funding arrangements suggested by DFID-CRD present a welcome opportunity to rethink our whole strategy for maximising the impact of what we do by optimising the linkages and collaboration between our various knowledge services.
- Having looked hard at the pros and cons of different models for closer integration, we have concluded that the current approach of offering a range of distinctive services targeting different niches and user groups is the right one, as it allows us to respond best to the diverse needs of our users.
- But we also believe there are substantial gains to be made by taking a more ‘joined-up’ approach – for example in sharing content, combining efforts on marketing and M&E, and pooling experience and lesson learning. This will allow us to reach out to new audiences while continuing to improve our current services”

The paper summarises the pros and cons of more joined-up working, this is summarised further as follows:

Pros	Cons
<ul style="list-style-type: none"> <li>▪ a more integrated knowledge pool</li> <li>▪ shared content</li> <li>▪ improved the user experience</li> <li>▪ better navigation</li> <li>▪ reduced potential confusion between services</li> <li>▪ scope for cross-marketing</li> <li>▪ sharing talents and skills</li> <li>▪ economies of scale</li> <li>▪ coordinated approach to planning and management of the services</li> <li>▪ maximising the overall impact</li> </ul>	<ul style="list-style-type: none"> <li>▪ radical change risks confusing current users and undermining their loyalty and trust</li> <li>▪ multiple project format has proved very successful</li> <li>▪ risks losing flexibility and creating a more homogenous product</li> <li>▪ services developed in partnership with different funders – should not all be directed by DFID +/- or IDS</li> <li>▪ new arrangements may demotivate staff</li> </ul>

<sup>43</sup> MK4D Propsoal (2005)

<sup>44</sup> *Maximising the impact of IDS Knowledge Services*. (Oct 2004), Draft for discussion. [Document 13 supplied to the evaluators]

In addition, the pros for bundling as in the MK4D proposal may be summarised as:

#### Pros

- increased cohesion
- reduced duplication
- an incentive and means to develop synergies
- develop cross-cutting work
- more secure finances
- reduce transaction costs
- efficiency gains through pooled staff and resources
- maximise impact
- shared technical platform

To achieve these gains, the MK4D proposal depicted the arrangement as follows, with the SLI and the Information Systems Unit (ISU) cutting across beneath the projects (Figure 6):

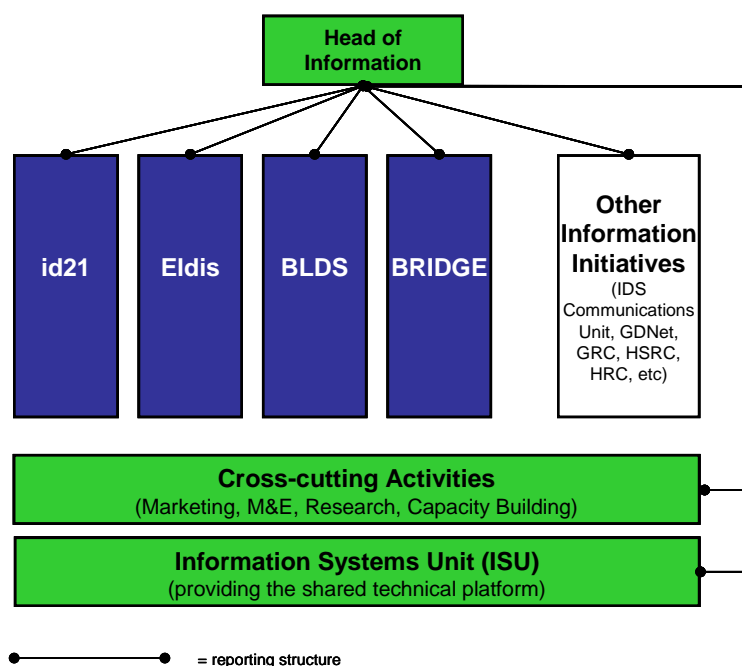


Figure 6. MK4D management structure (as per 2005 proposal)

MK4D clearly did take the four (now five) Information Dept. services down a bundled route, and it approached bundling in three main ways:

- 1) providing a cross-cutting support team – the SLI
- 2) adopting a set of cross-project structures for interaction between the projects, such as regular Information Project Manager (IPM) planning and progress review meetings, and a mechanism for reallocating underspends between the projects
- 3) investing in a common, integrated software platform – Oryx

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**SLI** – in the SLI Conceptual Framework Paper<sup>45</sup>, the Strategic Learning Initiative outlines its role. It states that: *“With the establishment of the Strategic Learning Initiative (SLI) as part of the programme ‘Mobilising Knowledge for Development’, we are developing a multi-stranded programme of work to generate greater understanding of IDS Knowledge Services as intermediaries in information and knowledge processes and the effects of this work on development.” ... “SLI integrates four streams of work to achieve these objectives: research, M&E, marketing and learning-based capacity development. All of the strands aim to encourage reflection and learning about and from environments and contexts in order to understand how we and other organizations could improve the outcomes of information and communication work in international development”.*

Hence the documents show that role of the SLI was conceived to have a strong research orientation – building understanding of how information intermediaries function, and how their services can be improved and monitored. However, the work of SLI has also included activities with a more practical bias. This has included capacity building - the ‘intermediary workshop’ in May 2007 with 10 external participants and a range of internal participants from the Information Department; marketing – workshops for MK4D staff run by the Marketing Coordinator; and M&E – the IMA M&E training.

The research has included analysis of a five country market research study commissioned pre-MK4D<sup>46</sup>, which investigated how development actors in the South search for, access, consume, and disseminate information, and use it to influence policy makers<sup>47</sup>; studies of national capacity and practices in information and communication for development<sup>48</sup>; and the DynamIC research project<sup>49</sup> being conducted, using a case study modality, to improve understanding of the information and communication (IC) problems in development that the MK4D services intend to address, and what roles they play in actually addressing these problems.

Cross-cutting structures – the Information Department has put into place a number of structures to facilitate cross-project working, and bring the projects operationally closer together. This has included an annual planning cycle and quarterly reviews in which the projects present their plans and progress to each other; a joint procedure for vetting new initiatives by projects; and continuation of the Information Project Managers (IPMs) monthly meetings. Some efficiencies in resource use are achieved by a joint IPM procedure for

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<sup>45</sup> Vogel & Wendt (2006). *In the Know: Thinking about knowledge, information and communication and the IDS Knowledge Services. SLI Conceptual and Programme Framework*. IDS Knowledge Services; Strategic Learning Initiative.

<sup>46</sup> Brown, C. (2006). *Summary of key findings from thematic market research reports*. Background document for lunchtime meeting, August 1st, 2006, SLI. [Document 18 supplied to the evaluators]. Plus associated country studies by Catherine Lowery. Also, encyclopaedic descriptions of development actors in Government, academia, and civil society were commissioned from Intermedia in 2005 (e.g. Intermedia (2005) TANZANIA: A Market Analysis [Document 28])

<sup>47</sup> Similar research was also conducted by the projects, eg.: id21 (2004) *id21 Marketing Research – Bangladesh* [Document 31]; id21 (2006). *id21 impact assessment and market research in India* [Document 55]

<sup>48</sup> E.g. Wolfe, R. and Fisher, C. (2006). *A snapshot of the Information and Communication for Development environment in Malawi*. SLI. [Document 26]

<sup>49</sup> SLI (?) (2006). *DynamIC Research Project Overview*. [Document 42]. Findings from DynamIC were not available during the review.

agreeing fund reallocation between projects if there are predicted underspends. In addition a MK4D Steering Group has been established, involving all IPMs, Head of Department, and DFID representation from DFID's Central Research Department (CRD). As with most of these structures, this has provided opportunity for information sharing and discussion of wider issues.

Oryx – a new software platform was needed for the services as the various packages in use in 2004 were reaching the limits of their capacity. Also data were being stored on a series of separate systems. The MK4D proposal envisaged the advantages of a new combined knowledge base would be:

- ease of sharing content between services
- easier navigation for users
- remote working for editors
- editors able to view and select content from other services
- streamlining of back-office editorial processes
- easier workflow management
- more uniform data storage
- portable, eg to GDNNet
- faster, more robust, cheaper to maintain and operate, and more easily up-gradable

However, Oryx has taken much longer to roll out than planned, due to both the prime contractor (Clear Thinking Group) stopping trading, and severe under-estimation of the time needed for this complex software development.

## 5.2 *Bundling gains*

Overall, and across the three main manifestations of the bundle (SLI, cross-cutting structures, and Oryx), have the envisaged benefits been delivered?

Some of the benefits have been realised: projects are sharing content (for example Eldis – BRIDGE links on gender), and the cross-project management structures and collegiate work style have resulted in more coordination of planning and management. There has been some website redesign (BLDS and Eldis), which has given improved navigation and user experience. And the bundle has meant a significant chunk of funding has been provided to the Information Dept for MK4D, with a reasonable amount of flexibility on how that is used for the services; it has given three years of secure funding.

Realisation of some of the other benefits has been constrained by the delays in rolling out Oryx: the shared technical platform has so far only been rolled out for Eldis, with this being extended to other services in 2008; the integrated knowledge pool has thus yet to become operational, and the associated efficiency gains in editorial and back-office functions have not been possible as yet.

The delays in Oryx, of nearly 18 months, have meant that the anticipated increase in integration in MK4D has been substantially more difficult. While MK4D bundling is a change process inspired by better usability and greater internal efficiency rather than a software-driven change process, the concrete experience of a new software system can be a useful focus for changed ways of working. It is therefore regrettable that its implementation is so late in the life of MK4D.

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However, a number of the planned benefits have been limited by the extent of combined working, by the approach SLI has taken to shared services, and by the incentives in the system. This is discussed in the following paragraphs:

The services have continued to operate as essentially autonomous units, reporting to the Head of Information, and sharing information with each other. They are moving towards underlying content linkage through Oryx. Marketing and M&E have continued to be managed and delivered from within the services, with focal points

providing a means to link between the services bilaterally and across to the leads on these topics in SLI, for example through marketing working group meeting and emails. Central activity has been undertaken by SLI, e.g. webstats and promotion of the Knowledge Services at conferences and through direct mail. However, one of the reasons for bundling MK4D was to *“achieve cost savings and/or efficiency gains by pooling skills and resources”*. It has been difficult to find evidence that these efficiency gains have been achieved.

The incentives in the Information Department have largely continued to be about the performance of the projects, with project staff identifying most strongly with the project they work for (Eldis people, BRIDGE people, etc), and staff and IPMs focused on delivering the targets in their project logframes. The MK4D logframe is owned only by the SLI.

As stated elsewhere (Section 3.1) the design of MK4D does not make it particularly clear whether the bundling dividend should yield within this phase or within the next. The level of integration seen at present needs to be considered in the context of where MK4D has come from. Prior to bundling, the five projects were more-or-less autonomous and essentially product-oriented entities. MK4D is a transition phase towards greater integration and value addition, bringing an increased focus on impact of the services. Nonetheless, if bundling/integration was a part of the design rationale, and even as a transitionary phase, progress on efficiency gains should be expected.

Staff perceive cross-project working and project working as separate – the latter is seen as *“the day job”*. The inference is that bundle-related activity is additional. Staff do perceive the merits of bundling, and are generally supportive of it, and of SLI in promoting it. However, to date bundling and the activities carried out by SLI have not tended to reduce the work load of the projects. Identifying real efficiency gains must be a high priority for the next phase.

SLI's self-evaluation of MK4D identifies that *“this [joint working] has been quite a culture change, given the independent existence and separate funding of the various services prior to the MK4D project”*, and that *“deciding how far and fast to push this [joint working] has been a balancing act”*. These are classic change management concerns – cultural and institutional change, and concerns about rate of change. However, MK4D has not been explicitly seen as a

#### Chicken or Egg?

The slower than expected progress in different joint-working areas pose a chicken or egg question. Oryx is a particular example – should Oryx have been a tool for achieving integration (i.e. part of the change process), or should the services have become more operationally integrated, and then a software platform developed to add value to that way of working? Similarly, SLI have tried to promote joint marketing and M&E activities, but should the services have become more integrated and then joint marketing and M&E could have supported the integrated bundle?

change management process, and so it has tended to operate more at the margins in regard to joint working.

At the outset, MK4D stated that *“We should tread carefully in making major changes to the orientation of services. The current project format has much to recommend it, with individual services all having their own distinct identity, user base, funders and stakeholder groups.”* But it also foresaw that for project teams, marketing and M&E would be more effective as a result of being supported by a central unit (in SLI). Thus the plan, in relation to marketing, was *“to set up a small central unit led by a marketing specialist to coordinate and energise the marketing efforts of individual services, and develop an integrated strategy for marketing IDS knowledge services as a package.”* So, *“By creating a separate coordination function, we hope to galvanise the marketing activities of all our knowledge services, and develop substantially our user base and profile, and ultimately our impact.”*

However, this coordinating function has not contributed strongly to the aims of achieving economies of scale, reducing transaction costs, achieving efficiency gains through pooled staff and resources, or reducing duplication. The projects have continued to undertake their own M&E and marketing, and research, and the SLI has been trying to both coordinate this and innovate and add value.

MK4D has rightly recognised one of the strengths of the cluster of services is their diversity and distinctiveness, but this also creates inefficiencies. The experience of this review has been that gathering basic information, such as lists of users, from across the five projects yields five structurally incompatible documents – mixtures of document files and spreadsheets, each with a variant set of column and field headings.

The overarching MK4D management style has been facilitatory and peer-based. This has allowed innovation to thrive. There has been a light touch impetus towards joint working, recognising that joint working could not be pushed fast. Balancing the ‘strength in diversity’ versus ‘efficiency of a combined service’ models has been a key challenge (see text box).

#### **Where on the joint working spectrum?**

Two ends of the spectrum of possible organisational models are:

- A. Operate as five completely autonomous services
- B. Combine all the services into a single mega-service

Prior to MK4D the services were operating close to point A. MK4D has moved them slightly towards Point B, and by the end of this (transition) phase, they should be ready (e.g. due to Oryx) to operate further towards that point. That is not to say Point B is the ideal model, or where MK4D should be heading – it is not. Exactly where on the spectrum MK4D, and the other services in the Info Dept, should be located is a key decision for the Strategic Review.

Efficiency is clearly lowest at Point A, and should increase towards Point B. However Effectiveness is likely to be optimum away from the poles, where the benefits of both joint marketing and individual service’s targeting and branding can be realised. This optimum has not been reached yet.



The review finds the next phase of MK4D needs to view joint working more clearly as a change management process, and push a bit further and bit harder towards integration and greater efficiency. A functional Oryx will assist in this, but it is suggested that changing the respective roles of SLI and the projects in relation to the functions on which SLI has hitherto been advising. The suggestion therefore is to centralise marketing and M&E functions in SLI, with the aims of: i) achieving a critical mass of marketing effort, and b) focusing M&E on aggregate impact<sup>50</sup>.

At present the services have been under-marketed. The country studies and web survey found low levels of awareness of the suite of MK4D services– both of the services in general and of services other than the one with which users are familiar. MK4D has been unable to be definitive about impact, partly as its impact assessment is a post hoc amalgam of projects' M&E. Overcoming both the under-marketing and lack of solid impact assessment are critical to the success of the next phase, and it is believed that centralising them will help address the problems. The suggestion is not to completely withdraw the tasks and associated resources for M&E and marketing from the projects, but to reverse the geometry – marketing and M&E should be owned, driven and led by SLI, with support coming from project staff who know the project-level specifics.

One might envisage some form of agreement – a contract (with a small 'c') or service level agreement – between SLI and the projects, whereby the projects commit to producing a certain level of outputs (as per an MK4D logframe) and SLI commits to providing a certain set of marketing and M&E services.

Given the suggested re-orientation, an associated suggestion would be to also reconsider the name of SLI – the suggestion is to take SLI away from a learning function, so a more service-oriented name might be appropriate.

The focus of the preceding paragraphs has been marketing and M&E. SLI has two other functions: capacity building and learning. If, as suggested elsewhere in the review, the Info Dept makes a step change in the way it works with Southern partners, then capacity building will be very important – changing from something desirable to something necessary. Capacity building would logically stay in SLI

The argument for maintaining learning/research centrally does not seem so strong. Projects have been closely involved in this, e.g. through DynamIC, and thus light coordination of research activities through the IPM meetings may be sufficient.

### 5.3 Oryx

A small separate study of Oryx was done as part of this review<sup>51</sup>, this section draws on this review, plus additional interviews with ISU and Eldis, and well as Oryx documentation, provided on a separate CD.

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<sup>50</sup> "Maximising the overall impact" being one of the stated benefits of bundling

<sup>51</sup> Shampa Nath (2007). *IDS Knowledge Services: Technology & Information Sharing In MK4D and Eldis*. Part of the Output to Purpose Review of the Mobilising Knowledge for Development Programme, and Independent Evaluation of ELDIS. Healthlink Worldwide.

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### **Oryx design**

A new, unified software platform for the Information Dept was under consideration since January 2004 or earlier. MK4D provided the largest share of the funding, (GDNet also contributed significantly), and with its focus on bundling, an additional impetus to realise this platform. The business case for the new platform (System X as it was called prior to MK4D) was based on the following factors<sup>52</sup>:

- “the current technology is reaching its limits in performance and functionality
- the current technology is becoming obsolete
- the current approach of separate databases (although using the same database package), data structures and interfaces for different projects is costly to maintain and develop
- pressure from funders and efficient use of resources require IDS information projects to work more closely together and share data to a greater extent - existing systems cannot support this cost-effectively
- GDNet require a system which can be migrated to Cairo in 2005/2006 - in the current system GDNet is too closely tied to Eldis to be migrated”

In 2004, System X was envisaged as providing a platform to which the following services would be migrated, in roughly this order: GDNet, Eldis, id21 Health Resource Centres, Participation.Net, DRC on Citizenship, IDS website, Library (BLDS) website, IDS research project information websites, BRIDGE websites, Livelihoods Connect, and the Governance Resource Centre websites, plus external sites: Ask Source databases, Narsis, Oxfam library database, and Alnap database. By the time the functional specification had been finalised early in 2005, (a few months before the start of MK4D), the list had been revised to the following: Eldis, GDNet, IDS website, id21, other MK4D services, and IDS research sites. It can be seen now that the original list was very ambitious. By the start of MK4D, the scope had narrowed to the MK4D services plus GDNet and the IDS website, and this may just be achieved by September 2008

Thus, Oryx has been designed with the intention of integrating the five services, enabling efficient sharing of resources between them and with external sources, particularly GDNet in the South. To this end, the Oryx core has been built so that it is common to all the services and will not require adaptation for each individual service. Only the templates and types of applications used by the service will vary from one to another. Key features of the system design are its facilities for quick and easily managed sharing of core content (such as document, organisation and announcement metadata) and of value-added content (such as abstracts) between different services using Oryx.

Prior to Oryx, the Info Dept services were running using: Windows 2000 and NT4 operating systems; Inmagic DB/Textworks, and Access databases; Cold Fusion 5, Dreamweaver, and some Inmagic Webpublisher 2 and 5 web applications; and Lyris ListManager v3/v6 mailing and discussion lists.

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<sup>52</sup> Beer, D. (2004) *“System X” - the project to replace IDS’ Internet information systems.*

Oryx chose not to just upgrade to newer versions of the software used on the previous platform, which would have been cheaper, but would not have provided the functionality required to meet the needs of the MK4D services nor of other IDS Knowledge Services. It takes a layered approach of: core database – API – application server – applications. This allows replacement of one layer without replacing the others. The core data are shared between the services, and the separation of the datacore (which uses Java API and MS SQL database) and the application modules (currently mainly Cold Fusion) allows future new applications to be plugged in and existing applications to be redeveloped or modified, without redeveloping the whole or re-migrating data. Incoming data can be accepted and outgoing data delivered in XML, and Oryx also includes a more sophisticated search engine – Ultraseek. Consideration was given to migrating to ASP.Net as the best web application server, but at present, it has remained with Cold Fusion, as this does not require such extensive and expensive staff training.

Overall, the upgrade to Oryx is seen as a long-term investment to provide the Information Dept with a platform and infrastructure which is very future-proof, allowing for continuing cost-effective operation and development over a long period without the need for complete replacement of the system.

### **Oryx implementation**

For various reasons, the development of Oryx has been significantly delayed. Its launch was originally set for April 2006. This was later postponed to September 2006 and was subsequently launched for Eldis on 11 June 2007, with completion of phase one Oryx functions due by the end of September.

The implementation delays originated with the original contractors – Clear Thinking Group (CTG) – who stopping trading roughly coincident with the start of the MK4D, though this was in stage five of the six-stage Oryx development process, which began in Spring 2004<sup>53</sup>. A new contract was signed with a company originally sub-contracted to CTG. The second contractors and the ISU worked together closely on developing Oryx.

Both contractors appear to have underestimated the time needed to build the platform and the time taken to test it, and have also found it difficult to grasp the complexities of the Info Dept and its many services. Also the second contractors and ISU have felt under considerable pressure to have Oryx up and running, and as a result, several problems were encountered during the “live” stage, which may otherwise have been picked up at the testing stage

In addition to change in contractor, ISU attributes the delays to the increasing complexity of the task, with the need to build a system which catered for GDNNet and IDS’ requirements in addition to Eldis’. This was seen as one stakeholder too many, when each has differing political pressures, business logic, priorities and requirements.

Eldis was taken as the guinea pig for Oryx as it has been the most pioneering in its use of ICT. However, Eldis has had to reduce its specification expectations during the course of

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<sup>53</sup> Preliminary scoping, requirements analysis, functional specification, technical specification, and the start of build/testing, were all done with CTG.

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Oryx' development, though they are content with the components Oryx is covering. The Eldis Web 2.0 Webcrossing community site is currently outside Oryx, and RSS feeds are outside Oryx (although the Oryx and community sites can be interlinked), and some parts of the RSS feed functionality were not implemented until October 2007.

Planning for Oryx was over-optimistic, and has continued to be so. Both ISU and Eldis believe that it would have been preferable to have set realistic deadlines, even if they were further into the future than they wished, than giving/being given unrealistic ones that were repeatedly missed.

### **Implications of implementation delay**

Oryx is 16-17 months behind schedule. The delays have made it difficult for the Eldis team to plan their work. Activities such as the establishment of an external content production network have had to be rescheduled as the main activities in these areas were to commence after the launch. Also some of the M&E indicators require Oryx to be operational for their collection. And, Eldis had to stop using regional email bulletins for a while because it was not possible to do so with the new system<sup>54</sup>; content production has decreased as it has not been possible to bring in external content automatically so far; and staff time has been diverted to Oryx work – as the timetable has slipped incrementally, some of this time has been released back to Eldis, but not in entirely useful quantities.

With the delay, Eldis has been able to dedicate more time to the Community platform, and new initiatives such as blogs. However these have been piecemeal in the absence of Oryx' integrating platform for the main Eldis data and services.

**Overall**, Oryx stands to deliver many benefits to both end-users and internal users. In particular, it stands to deliver more efficient and consistent production of content, and very importantly offers the potential of remote editing and content generation (and so supporting some decentralisation of MK4D). Its content sharing function – a key part of the integration – cannot be tested until the second services (id21) is added to the system in March 2008.

Even by the end of this phase of MK4D, Oryx is likely to be a work in progress. The services and their respective content should be active on the system (target August 2008), but there will continue to need to be modular software and hardware upgrades. There continue to be issues of whether Oryx will be a panacea – Eldis is uncertain whether external data can be handled by Oryx in the way it wishes, and the Community site, which Eldis sees as a key part of its future, is currently outside Oryx.

There is no doubt that the Info Dept needed to overhaul and upgrade its ICT software and hardware as the old system had reached its limits. An upgrade provided the opportunity to introduce more efficient ways of working, and for the services to share content. What is not clear is whether a bespoke approach was the only or even the most cost efficient means to achieve these benefits. This issue was not explored in depth with ISU in the review, but ISU's view was that the bespoke approach was the only possible one, given the key criteria for the ICT systems upgrading set in autumn 2003 by the Info Dept.

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<sup>54</sup> These resumed in early August 2007.

Given the importance, even centrality, of Oryx to the bundling concept, it is very unfortunate that the project has slipped so far behind schedule. With a second service, id21, not being launched until March 2008, Oryx will not be contributing to joint working until the original MK4D end date. This serves to confirm that this phase of MK4D has been transitional – moving towards joint working, with the real bundling dividend not being achieved until the next phase. It is recognised that some of the delays have been outside the Info Dept's control – eg the loss of CTG in summer 2005, at the start of the code writing, and after an 18-month intensive working relationship. However this was near the start – much of the further delay has resulted from incremental slippage during code writing and testing. The review is left wondering whether the Dept should have foreseen sooner the consequences of the slippages on achieving joint working in the lifetime of MK4D and reacted with some additional resource<sup>55</sup>? As it is, Oryx has been a costly development – approximately £350,000 in external consultants and equipment, plus considerable internal resources. It needs to be fully functional for the next phase to reap the dividend of this investment. It is recognised that there may be smaller, on-going upgrade costs, but the Info Dept predicts that there will be a continued need for internal staff time to allow for ongoing investment in the platform, as this will be crucial to delivering future improvements..

#### 5.4 Management and governance

The bundle is managed by the Head of Information, and its delivery is supported by the Strategic Learning Initiative (SLI). Each of the services has an Information Project Manager (IPM) who is responsible for managing the respective project and delivering its agreed targets. Overall, the IPMs have been effective in managing their services to deliver the information products against output targets.

The review was asked to comment on the effectiveness of management systems for the MK4D programme as a whole. Bundle management is a difficult balancing act, as the MK4D bundle tries to bring together five individual, individualistic and previously autonomous projects. Progress has been made in a number of areas, such as the joint planning, the joint strategic review, and the joint funding reallocation process. However, these, and other bundle activities are all additional management time. The MK4D self-evaluation says: *"integrating services or projects that have well-established individual identities and ways of working can bring important benefits but takes time, and adds to the management transaction costs (certainly at first)."* To date MK4D has added to transaction internal costs.

MK4D is managed in a style appropriate to an academic environment – it is inclusive, discursive and peer-based<sup>56</sup>. Change cannot be forced through, it needs to come gradually and in a collegiate way, especially when it involves different roles. The review finds that

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<sup>55</sup> Although it is recognised that finding and deploying additional skilled staff midway through a complex project is itself problematic, even if resources are available. Though this in itself demonstrates one facet of bespoke systems, that by their nature, supporting them is a more specialised task than for off-the-shelf systems.

<sup>56</sup> Universities have been described as "Post-Fordist" organisations - developing quality programmes involving teams of largely self-governing experts loosely held together by a common goal or purpose. In this environment, a "much looser project management approach that specifies responsibilities and completion dates but does not attempt to quantify every activity on a micro level. The project manager and the academic have a good deal of freedom to move resources around and adjust schedules to meet the reality of academic life." Bates (2000).

both ‘core functions’ supported from SLI may have performed better if they were managed from SLI rather than just supported and coordinated. The M&E function has, after some negotiation, managed to achieve a unified webstats system. Other M&E continues to be quite heterogeneous. MK4D services are generally under marketed – ‘A Good Place to Start’ is a good example of a marketing initiative from the centre, and it is considered that marketing would be more effective and efficient in the next phase if it, like M&E, is a core service, managed from a renamed SLI, which is more practically oriented.

The review was also asked to comment on the effectiveness and appropriateness of the various services’ advisory groups and other stakeholder consultation structures. The services have different governance and reporting structures, including: an id21 Editorial Advisory Group consisting of UK academics, an Eldis donor consortium, a BLDS Library User group, BRIDGE’s International Advisory Group, and Livelihoods Connect’s Livelihoods Network Steering Committee. These have not been reviewed in detail as they are more project level structures than MK4D ones. Nonetheless, the evidence is that having a panel of external experts who can advise on strategic and subject matter direction, and also act as advocates for the service does add value. The BRIDGE model seems particularly strong, though it is recognised that such a panel may be easier to constitute where the service has a narrower content focus. While their expert panels are useful, the country studies found that a) some respondents had been disappointed with the feedback and response from the services to requests, and b) that users would like to have the opportunity to interact more with the services. It is thus suggested that more localised user panels in focal countries may be useful, for both fine tuning services and as part of marketing chains and M&E activities. Eldis is already thinking along these lines, for example in Malawi<sup>57</sup>.

The Info Dept’s participation, and leading role in fora such as the research communications donors group and the M&E of research communications group has added to its profile.

## 5.5 SLI

The SLI was initially called the ‘Cross Cutting Unit’ (CCU), and was designed to “*combine efforts across information services in order to improve its effectiveness, and push the boundaries of what we can achieve*”<sup>58</sup>. Thus it aimed to “*strengthen and coordinate work on marketing and monitoring and evaluation of IDS Knowledge Services to help further understanding of users’ needs. It will also provide some space to step back from the day-to-day work of running services to develop a research programme on communication and development, and to push ahead with thinking on learning and capacity building to build closer links with Southern counterparts and audiences*”.

The SLI states it has three purposes:

- “To help improve IDS Knowledge Services in order to achieve their specific goals
- To proactively inform the IDS Information Dept’s strategic direction in order to enhance its ability to have a positive impact on global poverty and injustice
- To contribute to a broader IDS strategy”

<sup>57</sup> Eldis (2007). *Information for development country analysis: Malawi*

<sup>58</sup> Vogel (2005) *IDS Information Department: Strategic Learning Initiative*. Background Document. [Document 15]

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And it has produced its own Purpose Statement (July 2006): *“SLI is a 3 year DFID-funded programme that works with collaborators to strengthen the existing capacity and commitment of the IDS Information Department and its peers to design and implement information-based development interventions that are strategic and accountable to their stakeholders for their contribution to increasing social justice and reducing poverty.”*

From an MK4D perspective some of these statements could raise questions about priority and scope. The statement in the MK4D proposal shows that its function is to combine efforts across the services and improve effectiveness. However this could be interpreted as it conceiving of itself as a three year DFID-funded programme, rather than one component of a DFID-funded programme. It is understood however that the intention behind this statement was primarily to signal that SLI was a three year, time-bound enterprise, which might well be different in any subsequent phase. A remit that includes roles in formulating the Info Dept strategy and contributing more widely to IDS strategy; these roles have evolved since the SLI is the MK4D team with the most space to reflect on strategic matters. Thus SLI seems to have moved beyond MK4D. Broader Info Dept activities, such as having a key role in the strategic review do relate to the future of the MK4D services – however while the Dept does undertake a number of services other than MK4D, they are very much in the minority. From the funder’s perspective therefore, there is a question about value for money. To what extent was DFID expecting MK4D funding to be directly used for improving MK4D, and to what extent for improving the wider context of knowledge for development?

As discussed elsewhere in this section, the move towards functional joint working has been modest, and although this phase of MK4D might be considered a transitional phase, the functions under SLI’s coordination have succeeded less well than might be expected – evidence from the South is that MK4D has been under-marketed, the ability to demonstrate impact is not strong, and capacity building activities have also been modest. Some of this may be understood through review of SLI’s milestone workplan, which charts implementation of SLI’s strategy through three main workstreams, as per the SLI background document [Doc 15]: ‘internal understanding’, ‘understanding external environment’ and ‘relationships’. The main emphasis is in internal understanding, though to SLI, this means not solely reflecting on how things work internally, but also increasing the understanding of those within the department. .

The review therefore considers that SLI has offered less value for money than it might have. It has promoted a strongly reflective way of working in the Info Dept, but the timeframe for this reflexion has extended almost to the end of MK4D, and the investment in this reflection has been at the expense of more action-oriented tasks. Clearly in a research-based environment, the services must be well conceived and based on best practice evidence. However, much of SLI’s activity over the period has been focused on its learning dimension – both SLI’s own learning and that of people in the projects. It has undertaken a coordination function, such as ensuring all projects have an M&E strategy, but it is considered that the projects would have benefited from an SLI that led more strongly from the front.

## 5.6 M&E

DFID is extremely clear that one of the aims for the bundle was to shift the focus from production of outputs to achieving and measuring impact. Hence the Information Dept M&E

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Strategy has as the first of its goals for projects' M&E as: *"Findings produced demonstrate how the project has achieved its results"*, about which it says: *"This will require projects to be clearer about how their projects are intending to contribute to development change from the start of their work, asking the right questions, and using the most effective evidence, indicators and analysis tools to answer those questions."* (emphasis added). This task was devolved to the projects.

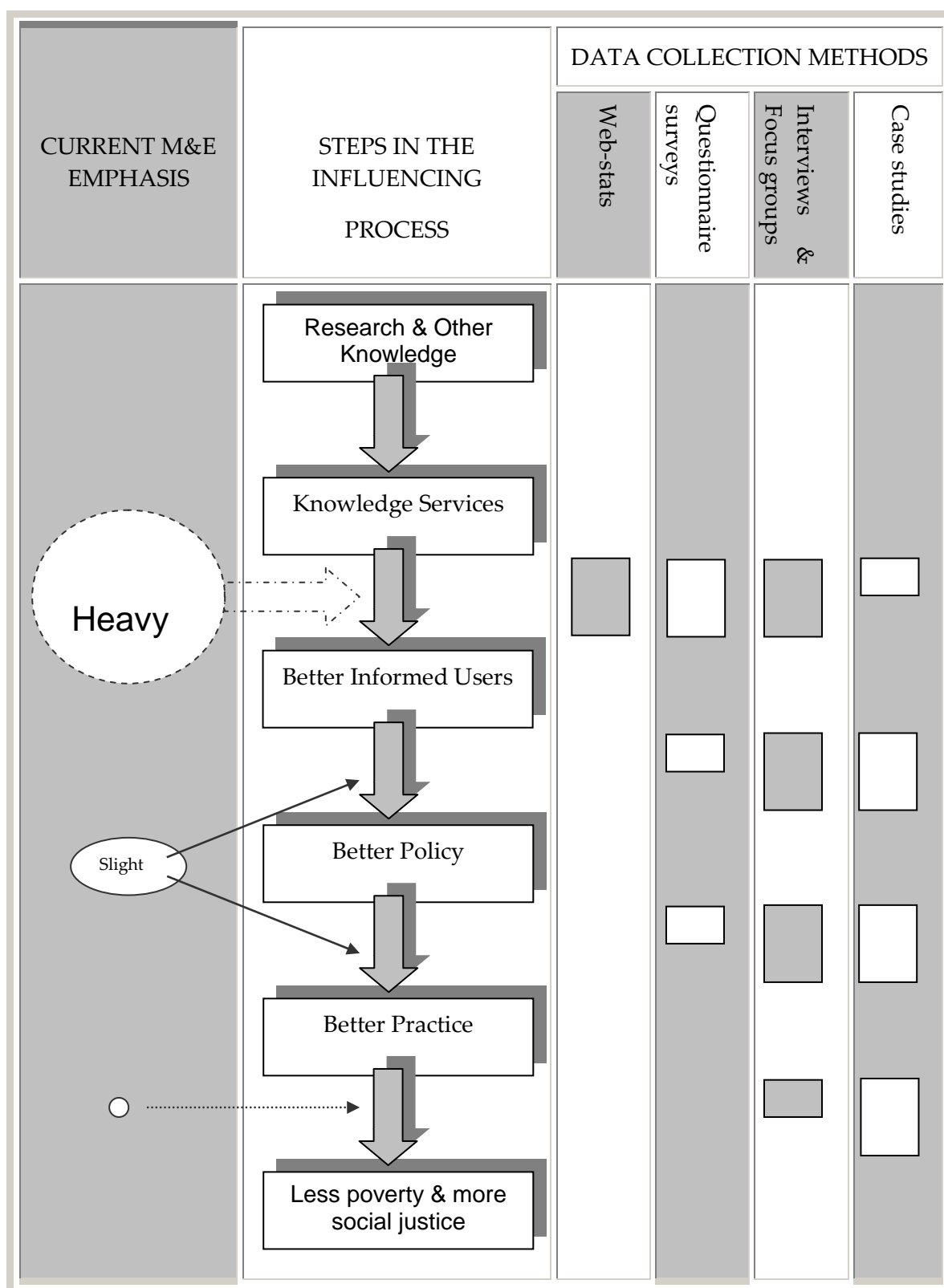
A wide range of monitoring tools and instruments have been employed by the projects as part of their M&E, but the balance of monitoring effort has been concentrated at the lower levels of the logframe. In the report on their M&E training, IMA produced a useful schematic summary of the M&E in MK4D (Figure 7). This shows the main type of data collection tools that the projects have employed (webstats, questionnaire surveys, interviews and focus groups, and case studies), and which part of the results chain from inputs to impacts they relate to. It also demonstrates quite clearly that the balance of M&E effort has been applied to the generation of product from the services, with M&E effort diminishing rapidly further along the results chain towards outcomes and impacts.

A key aim for the bundle M&E is: *"Findings from the bundle projects can be effectively amalgamated for analysis that produces new learning about development information and communications interventions"*, about which it says: *"Our ability to run this type of analysis is dependent on the level of coordination and harmonisation amongst the project M&E strategies"*. A large amount of effort has been invested in obtaining webstats that can be amalgamated and compared. The use of GeoCountry and ISSEL software and ABCE standards have greatly facilitated this, and the IDS intranet can now rapidly produce webstat summaries and a dashboard-type graphical output. There is no doubt that the knowledge services webstats are now accurate, precise, timely and geographically accurate. MK4D should be given credit for the success in establishing a very credible webstat monitoring system, with uniformity across the five projects. Its webstats are probably now more accurate and useful than DFID's own web site stats are.

While the webstats are now collected according to a set of common standards, it is less clear how comparable other types of monitoring are across the projects. Each of the projects has an evaluation plan, which includes collection of statistical data about usage, plus sets of surveys and case studies that are collecting more qualitative data. Both the quantitative and qualitative instruments and resulting data need to be comparable across services.

This is almost a microcosm of how MK4D works, and also how it might be improved. Stimulus from SLI promotes projects to do something new or different (eg how to better consider their M&E), and it offers ideas – these may be things already being carried out by one or more of the projects; projects then adopt the approach, but implement it in idiosyncratic ways; collation of project information is then difficult and not necessarily systematic. This leads to a profusion or similar but not uniform activity in areas including marketing and M&E, and overall inefficiencies in operation of the knowledge services. The need to not compromise the projects' individuality is recognised as diversity has given the knowledge services the strength it now has. Nonetheless, there is a need to strike a balance between the projects' autonomy and overall MK4D efficiency.



Figure 7. M&E in MK4D<sup>59</sup>

<sup>59</sup> Source: Howes, M. with Hurst, G. and Wendt, D. (2006). *Monitoring and Evaluation of IDS Information and Communication Services. Course Report.* IMA, Hurstpierpoint. [Document 24]

Some are trying innovative approaches, such as id21 using search engines to track where their material has been reproduced, referenced or where id21 has been endorsed<sup>60</sup>.

### 5.6.1. Impact Assessment

At the Purpose level, the MK4D logframe has two distinct types of indicator – a quantitative indicator relating to number of users in different types of organisation, and a qualitative one that aims to show impact. These two OVIs, and the M&E conundrum faced by MK4D in assessing its impact, are possibly best captured in the cover cartoon from the Most Significant Change manual:



The Information Department needs an M&E strategy that combines both approaches to give a convincing assessment of its impact, since at present weaknesses in both approaches mean that their combined use does not give a robust impact assessment.

The quantitative indicator is a brave attempt by the Information Dept to try to demonstrate quantitative outcomes. However, it fails. The ‘used and appreciated by’ phraseology is imprecise, and so ‘use’ covers a broad range of actions. It is not clear if it goes beyond reading emails, browsing the web and study of publications. It is recognised that defining ‘use’ is difficult, and not a new problem (see text box). It is germane to research that aims to influence policy and policy processes, as it is to the role of knowledge intermediaries. There is thus a body of knowledge<sup>61</sup> that could be drawn on to help elucidate the ‘use’ statement.

#### What Do We Mean By “Use”?

*“Within the knowledge utilization literature, there is little consensus on whether or how research does or does not inform public policy. One reason for this mixed reaction is due, in part, to the fact that ‘use’ and ‘research’ are often left undefined.... In terms of evaluating the use of research in public policy, this has created a great deal of confusion since it is difficult to measure with any certainty if what it is you are measuring is left undefined or is not clear.” (Neilson, 2001)*

There is also imprecision in who (which individuals or posts) in these organisations are making use of the information. What roles and positions of influence in these organisations are being targeted?

This indicator is also difficult measure, a task not facilitated by the way in which records are kept. For paper records and CD-ROMs, the projects have user postal addresses, usually with

<sup>60</sup> id21 (2006) *Online Content Tracking Report* [Document 56]

<sup>61</sup> E.g. research under ODI’s RAPID programme, and research by IDRC (e.g. Neilson, 2001; Schryer-Roy, 2005).

their organisation affiliations. For web users, the projects do not require users to sign in. This is sensible as signing in would likely be a barrier to use. However it means that while some classification of webstats can be achieved, it is mainly limited to users' country rather than type of organisation, though at a coarse level, some data can be obtained for .org, .gov and .edu/ .ac users. For email subscribers, particularly through Lyris, only an email address is recorded – again not facilitating identification of where a user works, or what their role is in that organisation.

The projects have good records of output and product, e.g.: 37,000 unique subscribers to Eldis, print circulation of 56,000 of id21's insights, and 3,400 subscribers to Livelihoods Connect. But they do not have good classification of their user base. It may be *assumed* that with these volumes of output, and over 150,000 unique visitors to the projects' website each month that the quantitative use targets by type of organisation are likely to have been met. However MK4D cannot prove this.

The projects have been very attentive in collecting narrative examples of their products having positive impacts. Many exemplar snippets exist in their reports<sup>62</sup>. However, the OVI is not quantitative, which it ought to be – how many specific instances were expected? Also there needs to be more structure to collecting this evidence, based on a theory of change – at present it is a rather ad hoc collection of narratives. Thus, as currently formulated, the permissiveness of the OVI means that practically anything can be seen to have contributed to the Purpose, running the risk of using a *post-hoc ergo propter hoc* logic to prove impact.

The review does believe that a narrative approach to impact assessment is valid. However in order to improve the credibility of this approach, it needs to be more structured. Possible improvements to the approach are proposed below, but these all depend on being more explicit about target users and theories of change. Being more specific about whose behaviour MK4D aims to change and by what various means it expects to so this is the starting point for improved M&E.

The way in which the progress information is structured in the MK4D self-evaluation is probably the best example in the Info Dept of trying to provide some structure and rigour in to the narrative approach to impact assessment. The progress review has structured the narrative cases studies according to:

- Types of development actor (a range of roles and agencies are given)
- The context and need for the information services
- How the information services are used

This needs to be tied back to how these factors were conceived in a theory of change. i.e. so that planned use of information and the actual used can be compared. For the next phase, it needs to be further developed to provide the starting point for this part of the M&E.

In relation to uptake of research outputs into policy, one study<sup>63</sup> has said: "*Policy uptake tends to be greatest if the process has a clear communication and strategy from the start. The sources and*

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<sup>62</sup> E.g.: Appendix 1 to MK4D's self-evaluation: *Stories of Use*.

<sup>63</sup> Piron, L-H, and Court, J. (2003) *Independent Evaluation of SDC's Human Rights and Rule of Law Guidance Documents - Influence, Effectiveness and Relevance within SDC*. SDC, Berne.

conveyors of information, and the way new messages are packaged (especially if couched in familiar terms) and targeted can all make a big difference to how the document is perceived and utilised. The key message is that communication is a very demanding process, and it is best to adopt an interactive approach". i.e the Info Dept is one part of a complex process, over which it has little control. Nonetheless, it should be able to state what it thinks the process(es) is/are, and where its role can have an influence. Other research says: "Although there is little consensus on what research 'use' refers to exactly, there seems to be broad agreement on the fact that research evidence rarely has a direct impact on decision making"<sup>64</sup> [emphasis added]. Thus there must be some doubt about the dependence on the type of case study story which tries to emphasise the direct impact aspects of what MK4D does.

A more sophisticated approach would be to try to take a theory of change-based approach, whereby impact stories are collected and structured around segments of a *causality map* derived from the theory(s). This approach was used for the evaluation of General Budget Support<sup>65</sup> (Figure 8, and a different causality map in Figure 9). A theory of change-based approach would require a theory, or theories, to be elaborated. This exists in parts, in different places, e.g. 'Models for Service' from BRIDGE, id21 and Livelihoods Connect<sup>66</sup>, and Eldis' Communications and Business Model paper. This work needs to be taken further, and coordinated to give an MK4D or Info Dept causality map.

Consideration also needs to be given to *how* narratives are collected. Although not formalised as such, the current approach is essentially Appreciative Inquiry (AI), as it asks questions to obtain positive stories about use of MK4D information. The instruments (surveys, questionnaires, focus groups) need to be designed in such a way that they do not become too leading. AI works well in an organisational development setting to identify what works and what to continue doing. As an M&E strategy, care must be taken that appreciative stories do not over-emphasise success – there is a need to give some indication of how representative stories are.

Eldis has made a start with classifying its qualitative impacts<sup>67</sup> – in this case by types of user, and by types of product. While this is not structured by type of impact, it does nonetheless provide some structure to the narratives.

Elaborating a theory of change requires consideration of how information gets translated to policy actions (causality), and who is involved (see also Annex 10). The MK4D M&E needs to pursue the work that has been done on this already, to help fully develop a theory or theories of change.

To assist in developing the theories, it is suggested that target users are separated into two sets: the general population of development actors, and a sub-set of influential actors (who would be specified<sup>68</sup>). With the general population, the aim would be to increase the broad

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<sup>64</sup> Schryer-Roy, 2005

<sup>65</sup> IDD and Associates (2006). Evaluation of General Budget Support: Synthesis Report. Joint Evaluation of General Budget Support 1994–2004. OECD-DAC

<sup>66</sup> Documents 33, 34 and 35 supplied to the evaluators.

<sup>67</sup> Eldis. *Qualitative impacts background paper* (10/09/07)

<sup>68</sup> E.g. parliamentary researchers, researchers in government-backed or government influencing institutes, individuals in think-tanks, individuals in policy units in NGOs, and consultants.

awareness and understanding of development issues (a high tide floating all ships). With the core target group of influential actors, the aim would be to demonstrate these actors putting knowledge in action according to specific parts of the MK4D theory of change.

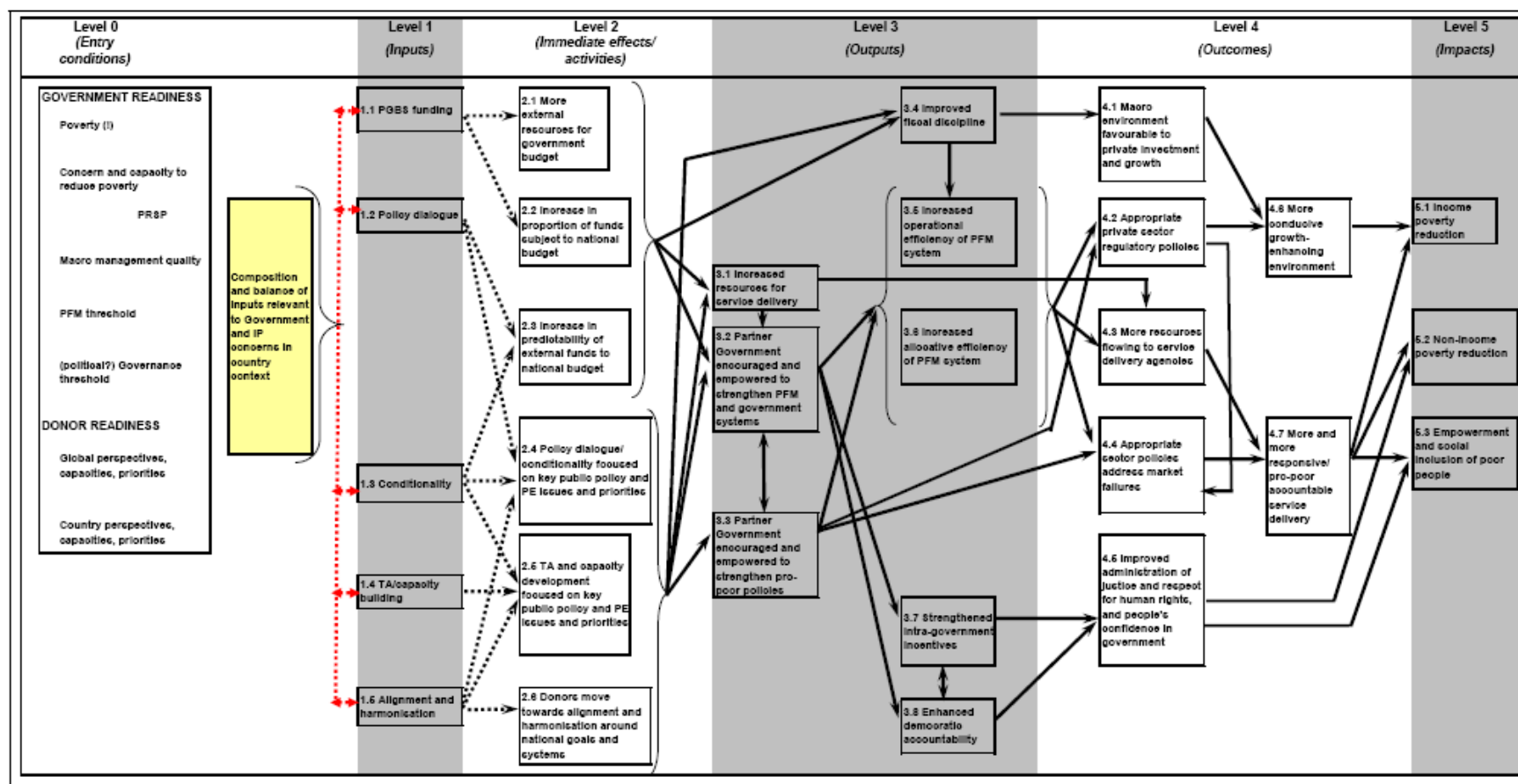
There would be separate OVIs for these two groups. ‘Use’ by the general population could be served by the dissemination-type measures already in the logframe. ‘Use’ and hence impact by the core target population might be monitored in a number of ways, other than the rather random collection of stories<sup>69</sup>, as at present:

1. The causality map approach above
2. Tracer studies on specific products, such as BRIDGE Cutting Edge packs, or id21 insights
3. Constitute a monitoring panel - conceptually similar to a panel sample in a household survey, or the viewing panel that is used to get TV ratings figures. A sample of users, representative of the target population, agrees to be regularly monitored on the way they use the services. This would enable the Info Dept to build up a picture of actual usage patterns over time (not snapshot use stories or usage statistics), and would be informative about both impact and how the services might be best tailored to promote knowledge into use. It would also enrich the understanding of causality and help improve the causality map.
4. A Most Significant Change (MSC)<sup>70</sup> approach, or at least elements of it, might make the impact assessment more robust. At present, ‘knowledge in use’ narratives and Bios are generally taken at face value. They are also generally elicited using a methodology that is somewhat leading – “can you give an examples of where MK4D products have made positive impacts on your work” type questions. MSC collects stories of significant change from the field – changes that are not necessarily related to the project being monitored. Thus is project-related changes emerge, the stories are the stronger for it. Stories may be provided by project staff, beneficiaries, etc, and they go through several tiers of selection to obtain a small set of the most significant. The organisation then goes back and studies these most significant stories in more detail and validates them. How the stories are obtained would need to be determined for MK4D, but the principle of validating a sample of change stories is very relevant.

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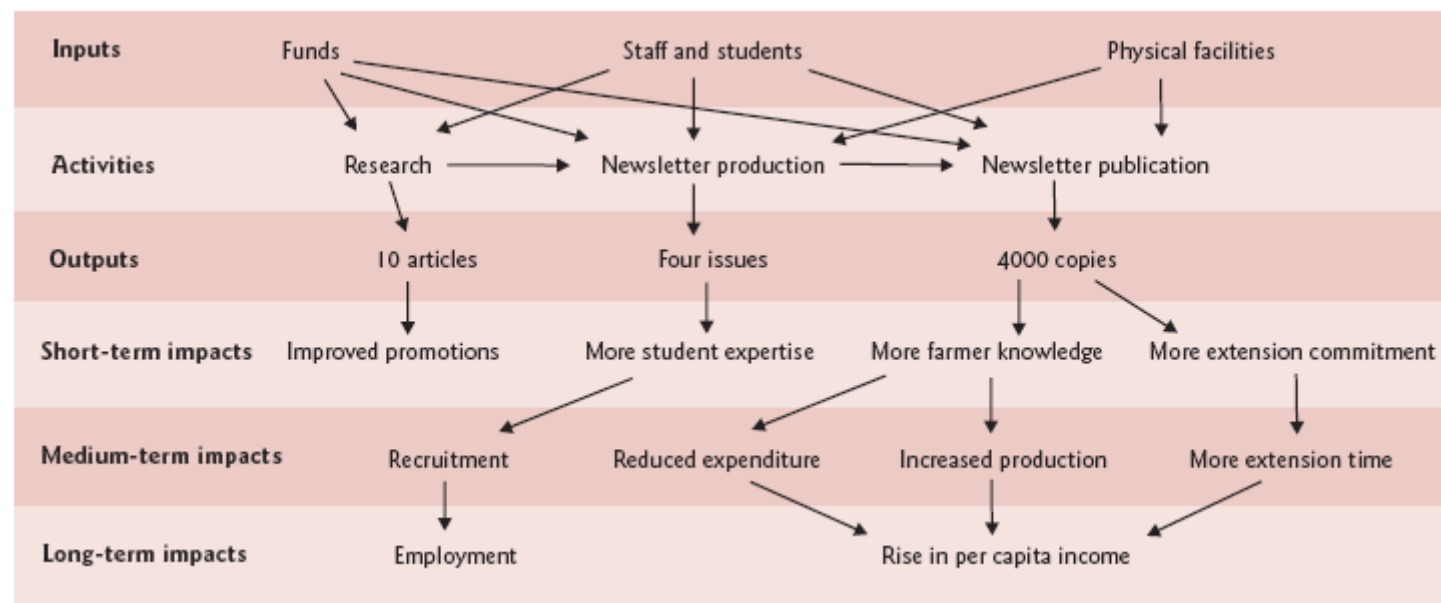
<sup>69</sup> A range of suggestions for improved M&E approaches are given in Annex 1. (Literature Review) of Perkins, et al (2006). *Proving our worth: developing capacity for the monitoring and evaluation of communicating research in development*. Programme Summary Report: Research Communication Monitoring and Evaluation Group. IDS, HealthLink Worldwide, IIED, Panos.

<sup>70</sup> [www.mande.co.uk/docs/MSCGuide.pdf](http://www.mande.co.uk/docs/MSCGuide.pdf)

Figure 8. Causality Map for the Enhanced Evaluation Framework for the OECD-DAC evaluation of general budget support<sup>71</sup>.<sup>71</sup> IDD and Associates (2006). *Evaluation of General Budget Support: Synthesis Report*. Joint Evaluation of General Budget Support 1994–2004. OECD-DAC

Although rather simpler than one of the MK4D services, Figure 9 shows a basic type of causality map, and the individual links around which qualitative M&E could be structured.

**Figure 9. Example of a logic model in flow-chart format for a newsletter for farmers<sup>72</sup>**



<sup>72</sup> From Mook, B. (2003). *Evaluating an Information Project: A Letter to a Project Manager*. ISNAR / CTA, Netherlands.

## 5.7 Marketing

The SLI marketing strategy<sup>73,74</sup> (not the MK4D strategy) identifies the following MK4D marketing objectives, to which the SLI marketing would respond:

- *“Bundle logframe - IDS Knowledge Services reaching a wider audience, especially in Southern countries, through more strategic and coordinated marketing.*
- *Bundle proposal - demonstrate widespread awareness, use and appreciation of IDS Knowledge Services among a cross-section of target user groups;*
- *Bundle proposal - have effective links with other national and international initiatives to take advantage of complementarities and improve knowledge flows.*
- *Information Department mission statement - create tools and resources to help development professionals be more effective in their work; ...engage with users to understand their needs ...share experience, question assumptions and learn to do things better.”*

And to meet these, it aims to achieve the following outcomes:

- *“Information Department staff involved in writing or implementing marketing plans are confident and able to do so and involve the Marketing Coordinator when planning marketing activities.*
- *Organisations with whom we have "made friends" are prepared to promote the Knowledge Services to their staff and networks.*
- *Analysis of comparators and the external environment is drawn on and referred to when programmes and services are planned.*
- *More key stakeholders are aware of the IDS Knowledge Services through profile raising in networks, conferences and from relationship building.*
- *Information Department staff are active in raising the profile of the IDS Knowledge Services, including services other than their own, in ways that are relevant to the audience's needs and interests.”*

These outcomes are almost exclusively process outcomes. They relate to behaviour change, mostly within the MK4D services, enabling marketing which aims to increase awareness and use to be more successful; the logic being that service specific marketing will be carried out at a project level so that the projects gain the learning and relationship marketing benefits of this. The MK4D logframe OVIs for marketing relate to instituting permission-based marketing, i.e. someone coming to MK4D via one service requests to be contacted about all the Knowledge Services. SLI says this is a market penetration-based growth strategy (growth through increased uptake of existing services by existing customers) and a shift in marketing best practice, partly prompted by legal changes. Although with webstats showing only 18% repeat business, this appears to be focusing on the minority of users.

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<sup>73</sup> Brown, C. (2006). *Strategic Learning Initiative Marketing Strategy. December 2006 to April 2008.* SLI

<sup>74</sup> The SLI marketing strategy is in fact a misnomer – it was not intended as a strategy to promote SLI. It is a document outlining the work of the SLI Marketing Coordinator and assistant from 2006 - 2008. It does however cover the marketing that MK4D would support for bundle projects, on the basis that they would also have their own marketing plans.



From the MK4D marketing targets and those in the projects' logframes, it is very difficult to get a sense of how good MK4D's market penetration is<sup>75</sup>. Are the 144 Livelihoods Network members the limit of that group of professional interests? Does 37,000 Eldis email subscribers represent a significant proportion of development professionals? The feedback from the country visits and the web-survey is that MK4D services are under-marketed, as development professionals are either not aware of them, or are aware of only one of the services. The next phase of MK4D will need to set some stretching marketing targets with year-on-year increases.

From the web survey of development professionals, about whom it was not known beforehand if they were users, 60% had heard of one or more of the Knowledge Services, and 40% had not of any (Table 10). More than a third of those who had not heard about any of the projects came from Government Ministries, Departments and Agencies (MDAs) in the South. A third of those who had heard of at least one of the projects were from academia. The web survey was a small sample<sup>76</sup> (70 development professionals, and a response rate of 50% to these questions). Nonetheless, it echoes comments from the country studies, and was an attempt to seek the view of those not already using the services, whereas much of the available IDS data are from known users. Overall, there is an indication that SLI must be sure that the marketing is appropriately directed to the target users.

Marketing was a common theme from the country studies. The Bangladesh study found that: *"Overall awareness about the IDS services is not very high and that is the main reason for sub optimal use of this resource. Those who are aware of the information available use the services often, though there is room for improvement in terms of developing a loyal base of users."* The Malawi study found that: *"In terms of weaknesses, the major one that stands out is that the service is not strongly marketed in Malawi"*, and in Tanzania: *"Some development agencies and NGOs do not know about Eldis and yet it has almost everything they need; more publicity is therefore needed."*

**Table 10. Awareness of MK4D services<sup>77</sup>**

<sup>75</sup> Just prior to commencing MK4D the Info Dept did commission Intermedia to research and profile the size of the market in 10 countries. This proved to be a time consuming exercise, but did reveal for example, that apparently Rwanda had only one public library at that time. What is less clear is how this information has been used to set targets, which generally tend to be incremental without recourse to an absolute (or even approximate) baseline.

<sup>76</sup> Due to data protection concerns, the web survey did not tap into databases of development professionals as had first been considered. It was a selection of development professionals known to the reviewers, who it was expected would have need of knowledge services, and might therefore know of the IDS services. The 60% success rate is thus not unsurprising.

<sup>77</sup> N = 35.

11. Which of the IDS services have you heard of and how did you first learn about them?							
Have you heard of it?							
	Yes				No		
BLDS	23.5% (4)				76.5% (13)		
BRIDGE	25.0% (4)				75.0% (12)		
Eldis	76.5% (13)				23.5% (4)		
ID21	61.1% (11)				38.9% (7)		
Livelihoods Connect	70.0% (14)				30.0% (6)		
How did you learn of it?							
	Internet search	Colleague recommendation	Recommended when studying	Workshop	Journal	DFID or other donor	Other
BLDS	0.0% (0)	50.0% (1)	50.0% (1)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)
BRIDGE	25.0% (1)	25.0% (1)	50.0% (2)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)
Eldis	38.5% (5)	38.5% (5)	7.7% (1)	0.0% (0)	0.0% (0)	7.7% (1)	7.7% (1)
ID21	16.7% (2)	33.3% (4)	8.3% (1)	8.3% (1)	0.0% (0)	25.0% (3)	8.3% (1)
Livelihoods Connect	6.7% (1)	33.3% (5)	6.7% (1)	20.0% (3)	0.0% (0)	26.7% (4)	6.7% (1)

The web survey (Table 10) shows that users came across the services firstly through personal recommendations and secondly from searching the internet. A very similar pattern emerges from the country studies (Table 11).

**Table 11. Where respondents heard about the MK4D services.**

	Internet search	Colleague recommendation	Recommended when studying	Workshop	Journal	DFID or other donor	Total
BLDS	0	1	1	0	0	0	2
BRIDGE	1	1	2	0	0	0	4
Eldis	5	5	1	0	0	1	12
ID21	2	4	1	1	0	3	11
Livelihoods Connect	1	5	1	3	0	4	14
<b>Total</b>	<b>9</b>	<b>16</b>	<b>6</b>	<b>4</b>	<b>0</b>	<b>8</b>	<b>43</b>
Percentage	21%	37%	14%	9%	0%	19%	

The Bangladesh country study found that the: “Majority of those interviewed chanced upon the IDS services when searching for information using google or yahoo search engines. Eldis and BRIDGE were used more than the other IDS knowledge services. Livelihood connect came in third, however id21 was seldom used and no one among those interviewed has used BLDS. In fact only one

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*person had heard of BLDS. ... Interestingly very few of the users of Eldis took the initiative to look up the other specialized IDS services on their own. Therefore, the Eldis user continues to use Eldis and the Livelihoods Connect user uses this service alone. Only those who receive alerts from several of the IDS services were inclined to look up more than one IDS service in their search for information."*

Interestingly, the Malawi country visit found that IDS publications stocked in the libraries are also an important link for new users to IDS knowledge services.

The two marketing messages emerging are the need to ensure the services feature well on the main search engines and that those who are influential are willing and able to recommend the services. The marketing approach has taken a planned shift from being transactional – informing people about the services, to a relationship approach, which does address this ‘personal recommendation’ aspect of marketing (which could be called viral marketing). But getting to know partners well enough to be part of the marketing strategy has taken time, and is limited in each of the projects. This type of relationship marketing does take time – time needed to build the relationships, but while MK4D has been running for 2½ years, the services have been running for significantly longer, and might be expected to have relationships on which the marketing could build more rapidly.

Again, taking more of a relationship approach to marketing require a good understanding of the user base, as well as where they obtain information and what information they need. This links marketing and to the fundamentals of a communication strategy, which would encompass and specify, in order: Audience, Message, Medium, Monitoring.

Without detailed appreciation of audience, tailoring the message and the delivery medium to the user base becomes more difficult. The review finds that understanding and targeting the audience for development information is less well developed than it should be. For example, the SLI Marketing Strategy document reads as supply focused – being more of an internal document, it does not take a user perspective, and hence, with the exception of developing a peer group (‘making and keeping friends’), target users are not mentioned (though the intention has been that this focus is picked up in the services’ marketing plans). Work more recent than the marketing strategy does show a deeper understanding of users, for example country-level studies (such as Kenya). And, at the level of the projects, there is some much more detailed user targeting in services’ marketing strategies. BLDS and Eldis have produced papers on their target audiences, and the id21 Marketing Strategy 2006-2008 outlines the five segments it planned to focus on:

- key individuals with influence on policy-making - including those in a position to market id21 themselves to colleagues and contacts.
- gatekeepers of information access points - staff in libraries, resource centres, etc.
- multipliers - organisations or individuals prepared to circulate id21's printed materials.
- media within and reaching developing countries - trainee journalists, editors, etc.
- UK researchers - to help ensure id21 access all UK-funded research available

id21 undertook market research relevant to all the services in the year immediately preceding the start of MK4D<sup>78</sup>. This included over 200 interviews from visits to nine countries. This examined how people searched for information, how they accessed it (in what form), how they used it, and what different behaviours were for dissemination users own information. For the purposes of this study, the market was primarily divided into types of organisation – government, NGO, INGO, donors, researchers, plus other media and other groups. Most of the findings of this set of studies resonate with findings from the country studies (e.g. Table 12) conducted for this review, such as: the popularity of web searching to find information, but it has limitations due to connectivity problems, and the continued importance of print media and personal contacts. The studies see some separation of users in the organisations, but the narrative is mainly around ‘NGOs do this’, ‘government behaves like this’.

Of course it is individuals in organisations that use information, and there is a need to understand who in organisations is being targeted. For example, in government are the services going to be used by the policy-making Minister, or by a ministerial assistant tasked with producing a brief?

**Table 12. Importance of information sources**

Respondents were asked to rank the sources of information in order of importance, 1 to 5 with 1 being the most important. By giving each of the ranks a weighting inverse to their position (ie a rank of 1 has a score of 5, 2 a score of 4 etc) it is possible to assess the overall importance of each information source.

Rate	Score	Internet searches		Paper-based sources		Face-to-face contact		News feeds/email bulletins		Radio & TV		CD-ROMS	
		No	Score	No	Score	No	Score	No	Score	No	Score	No	Score
1	5	21	105	5	25	9	45	2	10	0	0	0	0
2	4	7	28	12	48	9	36	7	28	1	4	1	4
3	3	6	18	13	39	8	24	7	21	2	6	0	0
4	2	1	2	5	10	4	8	9	18	6	12	7	14
5	1	0	0	1	1	5	5	8	8	6	6	9	9
		153		123		118		85		28		27	

The ‘maximising impact’ workshop<sup>79</sup> recognised the importance of identifying the different actors involved and trying to understand their different interests and perspectives, and the importance of personal contacts and networks, not least to establishing trust and legitimacy

BRIDGE has been pursuing these ideas, and is currently reviewing who its stakeholders are and considering, in turn, how to reach them. Its M&E review<sup>80</sup> recommended that BRIDGE needs to: “*think more carefully who the BRIDGE primary audiences are, such as urban policymakers at national level, or gear different outputs to different audiences, i.e., newsletters at policymakers, and reports to NGOs etc*”, and that BRIDGE should identify not only who, but also “*when to try to reach target audiences. E.g. the BRIDGE report on ‘Uganda Gender and Poverty Assessment’ ended*

<sup>78</sup> The studies were led by the team that became the M&E and marketing coordinators in SLI when MK4D commenced, and the cross-country analyses were authored by Catherine Lowery.

<sup>79</sup> Geoff Barnard, Liz Carlile and Deepayan Basu Ray (2007). *MAXIMISING THE IMPACT OF DEVELOPMENT RESEARCH. How can funders encourage more effective research communication? FINAL REPORT*. Based on a Workshop held at the Institute of Development Studies, 16–18 October 2006. IDS, Brighton.

<sup>80</sup> *Review of BRIDGE M&E (2002 to 2007)*. Tara Kaikini (with contributions from the BRIDGE team). May 2007

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*up being too late for the Ugandan Poverty Eradication and Action Plan (PEAP) (although this was out of BRIDGE's control as we were working with other donors at the country-level)".*

Part of using relationships for marketing also involves understanding how information is shared between people. In Bangladesh, it was found that those working in the government do not share information with colleagues, so this may need a different strategy to target this under-reached group. Some of those in multilateral agencies and INGOs regularly forward relevant and interesting information to their colleagues; young academics do pass on important links and sources to the students however the more senior level academics do not do so.

### **Cross-linkage**

The marketing strategy identifies cross-project linkage as an important element of marketing, but the opportunities to promote cross-linkage between the services have not been well taken. There is little sign-posting in the web sites to make users aware of, or navigate them to other MK4D projects. All the projects' web sites have a link on the front page saying "one of a family of knowledge services from IDS", which takes the users to the Information Department home page. The tag is clearer on the new BLDS and Eldis sites, though the text does not click through on the Eldis header. However, the tagging is not obvious or well promoted on any of the sites. When users do click through to the Information Dept home page, it is a disappointing experience (Figure 10)<sup>81</sup>:

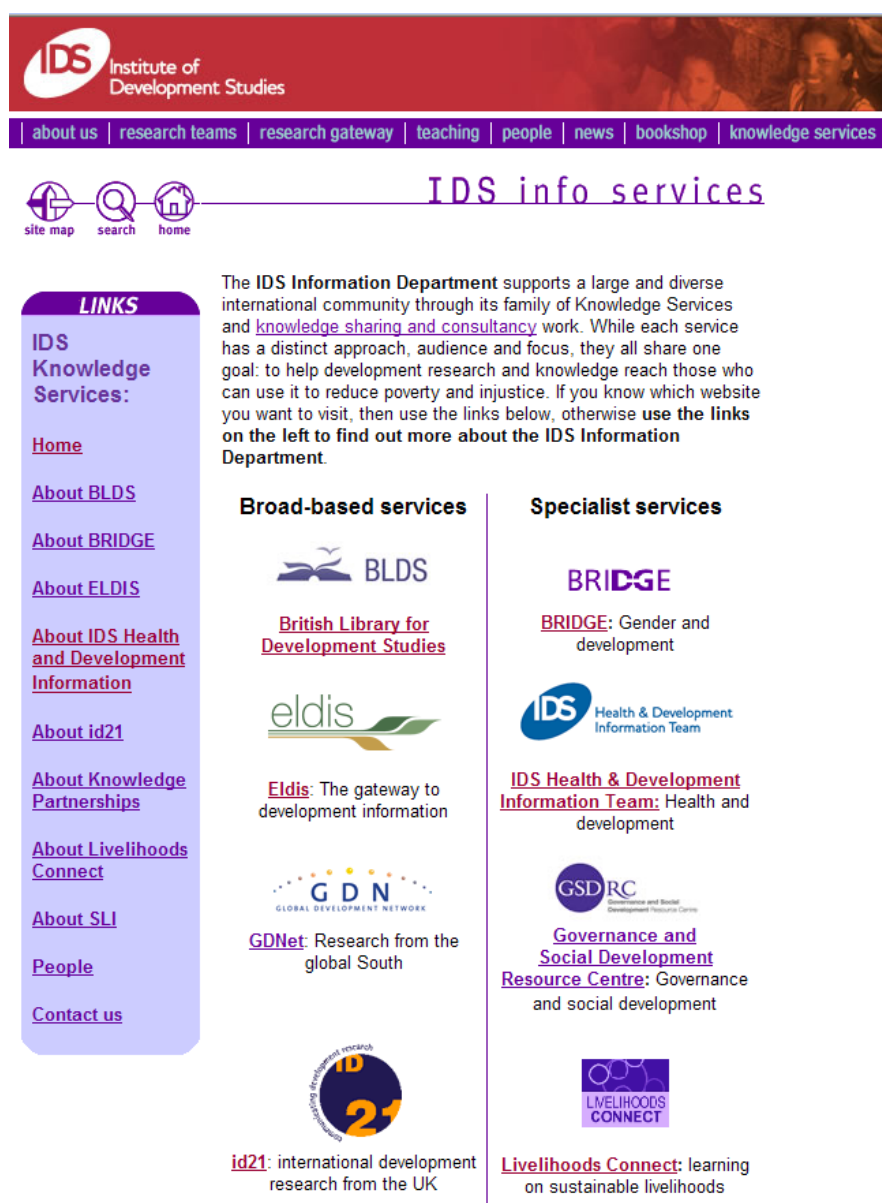
It does not follow principles of good communication practice, as it is not user-oriented. It is internally focused, with a collection of icons promoting the services, but without much explanatory separation in their function and aims. There is no single search function on the page that harvests information from across the projects. This page should be a shining example of the science of good communications, but it is not. It is understood that there are plans, again on the back of Oryx, to redesign this page. When this occurs, it needs to be user focused, and maximise the cross-project marketing opportunities.

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<sup>81</sup> Must be pointed out that between the draft and final versions of this review, the Info Dept launched its revamped and considerably improved website, which does include a cross-site search function.

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Figure 3. Information Department home page



## 5.8 Capacity Development

Capacity development has developed from limited activity prior to MK4D. It has developed an understanding of and approach to capacity development that goes beyond training and supports the relationship-based approach to marketing. SLI conceives of capacity development primarily with three dimensions: functional capacity to deliver, operational capacity, and the capacity to innovate. It also strongly emphasises mutual learning with its peers and partners as a route to capacity development.

An info-mediary workshop was hosted for 10 participants in May 2007, and resulted in formation a peer and support group – the I-K-Mediary Working Group. The workshop report was well received, and the next workshop is due to be hosted by the member from

South Africa. Capacity development support has been given to Eldis training ESRF and BLDS with their work with the DFID Research Programme Consortia (RPCs) – which will be further increased in the next phase. While it is recognised that capacity development is difficult to measure, and the outcomes are partners better functioning in relation to provision of knowledge services, there is also a need to take a view on whether outputs are being produced that are likely to lead to these outcomes. At present, while some innovative activities have taken place, the output achievements are quite modest over the course of a three year programme. This area of work is stated to be about transitioning to being better able to support Southern partners in the next phase, and it will be necessary to demonstrate that SLI can make this step change in 2008. This is needed both to demonstrate what has been achieved in terms of preparation in this phase, and also because with a proposed significant increase in the level of engagement with Southern partners on information processing and supply, there will be a much greater demand for capacity development services.

MK4D depends almost entirely on in-house resources to produce its products. GDNet has migrated to Egypt, and for technical reasons, the planned content sharing has not yet commenced. This means that with a few exceptions (eg some marketing) the projects must source and select all their own content, process/abstract/package all their content, market all their content, and monitor its use. This is a centralised model, but one that reflects the skills and comparative advantage of IDS. However the services may improve relevance to the audience and efficiency by operating a more distributed model. A model whereby more content is produced in the south, and there is more south-to-south marketing.

There are clear signals that DFID will increasingly not view MK4D as fit for purpose if it maintains an entirely centralised and therefore northern-based model of operation. The direction of DFID's own operations and the direction of its research programmes and consortia are towards country offices and/or regional hubs. Similar models have operated in the way that INGOs function. Evidence is that a less centralised model is more relevant to users and partners, and develops better contact and communication with them, as well as having lower operational costs. For the next phase, the services should have a much greater involvement of southern partners. It should be clear that this is involvement in the core processes of knowledge services, not just increasing the proportion of southern research in the services' content.

Part of the difficulty of having nearly all functions being northern-based, is that the projects faces challenges in both accessing southern content, and marketing in the south. Just under a third of web users are from the south, and southern content is about the same level<sup>82</sup>. There is a need to rapidly build capacity in the south to process content and market the services. Oryx caters for this. This would allow the services to alter their ways of working to focus more on selection, quality and impact assessment, and less on content production. The vision should be for a distributed model of knowledge services, i.e. like the internet, a network of smaller units, rather than one central server.

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<sup>82</sup> Eldis – 15%, Livelihoods Connect and id21 – 33%, BLDS – 62% of indexed journals.

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Taking a distributed model forwards, the services can follow two complementary approaches: working with a pool of like-minded organisations in the south – other info-mediaries, and drawing on a range of individuals. Some progress has been made with developing and building the capacity of a small group of info-mediaries from the south. This is a modest initiative at present, and needs to be scaled for the next phase, though it is recognised that the info-mediary capacity development initiative is primarily not intended, at this stage, to be concerned with MK4D service delivery.

An issue which MK4D will need to address as part of its strategy is the tension between having a much greater involvement in the south, and working as a bundle. It is not suggested that MK4D or the Information Dept necessarily needs to replicate itself in Southern countries. There would also be a danger of crowding out existing local players, so partnerships are likely to be the more sustainable way forwards. But it may well be easier to find project-level partners in the South, rather than organisations that can partner the bundle in its entirety.

Regarding working with individuals, Oryx provides the platform for content editors to be remotely based (in the north or south). There is also a vast untapped potential in getting users to better promote the services. There is a need to promote a knowledge sharing culture through the website – both on the supply and distribution sides.

On the distribution side, there is a need to encourage readers to share articles – possibly through both more ubiquitous and obvious ‘send to a friend’ buttons (on a sidebar?), but also through capacity development on learning and sharing skills. It is suggested the services could develop a common on-line tutorial on web research and on personal and organisational knowledge management and sharing. For example, Livelihoods Connect has simple instructions on “How to View, Save and Print the Guidance Sheets”, which could be matched with guidance on sharing these sheets with others. If each user becomes also a MK4D marketeer, what is in effect pyramid marketing could improve awareness of the services.

## 5.9 Funding

MK4D is funded by DFID, but DFID’s funding to MK4D covers only part (albeit the larger part) of the costs of running the projects. The breakdown for the last two financial years is as follows (Table 11):

**Table 11. MK4D Income Summary<sup>83</sup>**

DFID MK4D funding	FY 2005/06		FY 2006/07	
	Split of DFID funds in MK4D (%)	£	Split of DFID funds in MK4D (%)	£
BLDS	13	238,235	14	359,652
BRIDGE	8	145,175	8	194,652

<sup>83</sup> Source: Information Dept.



Eldis	16	295,836	17	430,726
id21	47	889,805	38	948,932
L'Hoods Connect	0	0	4	110,000
SLI	16	305,333	19	466,139
<b>Total DFID MK4D</b>	<b>66</b>	<b>1,875,000</b>	<b>71</b>	<b>2,510,000</b>
<b>Total other funders</b>	<b>34</b>	<b>982,370</b>	<b>29</b>	<b>1,021,620</b>
<b>Grand Total</b>	<b>100</b>	<b>2,857,370</b>	<b>100</b>	<b>3,531,620</b>

DFID thus funds between two thirds and three quarters of the cost of the projects in the bundle. In 2005/06, bundle income included contributions from over 15 sources, with the significant ones being: DFID (£1.95 million), SIDA (£197,000), SDC (£119,000), University of Sussex (£87,000), NORAD (£65,000), and DCI (£50,638), as well as £271,000 from IDS itself as contribution to the library, which is where the University of Sussex's contribution is also earmarked. Thus the library has three main funders. BRIDGE has funding from DFID, SIDA, SDC and DCI. id21 is entirely funded from DFID's MK4D contribution; Livelihoods Connect receives €135,000 from Irish Aid for the period 2006-2008, and Eldis is funded by a donor consortium consisting of DFID, NORAD, SDC and SIDA.

If the other major contributions are included, then in 2005/06 the approximate division of the ~£2.6 million annual budget was as follows:

id21	34%
Eldis	26%
BLDS	23%
SLI	12%
BRIDGE	6%

Livelihoods Connect – not in the bundle in 2005/06

MK4D is an accountable grant, which gives the Info Dept flexibility in how it uses the funding to achieve the MK4D targets.

### 5.10 Future Funding and Paris

As seen above, MK4D makes up its funding from a range of sources. However, only DFID funds the bundle. Other donors fund specific services. Eldis has been successful in attracting other donors, and so operates as a basket funded model in its own right. Eldis sees itself as being in Phase 3 – a five year phase running from 2003/04 to 2007/08. DFID's contribution through MK4D is funding part of a 3 year slice of Phase 3<sup>84</sup>. The relative contributions to Eldis' basket fund are shown below (Figure 11):

<sup>84</sup> IDS (2007). *ELDIS Phase 4. Proposal to SDC for Funding for 2007/8 to 2009/10*.

**Figure 4. Eldis phased basket funding****PHASING OF ELDIS FUNDING - Main Funders**

Funder	Phase 3					Phase 4				
	Year 1 FY 2003/4	Year 2 FY 2004/5	Year 3 FY 2005/6	Year 4 FY 2006/7	Year 5 FY 2007/8	Year 1 FY 2008/9	Year 2 FY 2009/10	Year 3 FY 2010/11	Year 4 FY 2011/12	Year 5 FY 2012/13
SIDA						t.b.c.				
NORAD					t.b.c.	t.b.c.				
SDC					Proposed SDC funding extension					
DFID										

While it is recognised that the services each have strong identities with, and loyalties from, different donors, it is considered that this level of funding integration is at a tier too low. There are tremendous efficiencies to be gained by moving to a new level of donor engagement in 2008. It is our belief that the importance of increased aid effectiveness, as captured in the Paris Declaration, is now so important to donor aims that they would be sympathetic to a more harmonised and programmatic approach to funding knowledge services for development. NORAD have confirmed this view, but SDC were content with current level of involvement with Eldis – it appeared that they have no staff time available for a deeper engagement..

Donor interviews also confirm that they see their funding of IDS' Knowledge Services primarily from a global public goods perspective, whereby development actors, especially in the south have better access to information, and make better, more evidence-based decisions.

This review considers that DFID and IDS has taken the correct route in forming a bundle of services, though the bundling dividend has yet to be fully seen, for a number of reasons, including the delays in the development of Oryx.

The next logical step is to promote IDS Knowledge Services, rather than the projects, to donors and achieve a basket fund for the greater bundle. The advantages include:

- Flexibility of management
- Some fungibility between services
- Increase efficiency, including in fund raising and reporting

For donors the attractions include:

- Broader attribution
- Spreading risk
- Sharing agendas
- Working towards common goals
- The various aid effectiveness arguments that are captured in the Paris Declaration

Presently, funding relationships with donors exist at both project and MK4D levels. In a bundled model, it is anticipated that these relationships would migrate more towards MK4D/the Info Dept, who would have the task fund raising at the bundle level. It would be the Information Dept task to 'sell' to donors the idea of basket fund the core service, but they seem receptive.

There is an analogy to draw here from bilateral aid effectiveness. Pre-MK4D the knowledge services were either individual donor-funded projects, or small basket funds (such as Eldis and BRIDGE). MK4D has been an initiative to move to the next level of basket funding. What is suggested now is either a basket-fund of all the knowledge services<sup>85</sup>, or even a budget support type model to the Info Dept. As with new aid modalities, donors may feel they are losing control, but it is suggested that a steering panel with donor involvement would then play a larger role in planning and performance monitoring. Funding, over a certain level, would buy a seat at the table.

It should be noted that these recommendations do not equate with saying donors should provide core funding to the Info Dept. Management still needs to be lean, and the emphasis on the services.

The Information Dept should aim to discourage donors from cherry-picking specific services, although it might be possible for funders to buy 'non-core' services, *in addition*, to a certain level of core service funding. This currently happens, for example with Eldis (see box). The community site piloted by Eldis provides the scope to host and manage such functions.

Clear funding messages coming from DFID are that:

- To assure funding, impact must be evident
- Continued funding is not assured through 'business as usual' – a key change must be more southern involvement
- The Information Dept must be tasked with earnestly developing options for attaining medium term sustainability, funding is not indefinite
- Despite the increases in DFID's funding in the Comprehensive Spending Review and the indicated increases in CRD's funding within that, there is a need for the bundle projects to reduce their DFID dependency

**Box: Non-core Eldis services:**

- Workspaces to follow-up CTA training courses on agricultural information work
- Workspace for DFID education team for in-team discussion and policy formation
- Weblog based brochure-website for Institutional and Policy Support Team (IPST), Kenya
- Weblog based site Afghan rural development with Aga Khan Foundation Afghanistan Programme
- Websites for development of Participation.Net concept (group of organisations interested in participation and citizenship)
- With Noragric, a dedicated resource guide and email newsletter focusing on Norwegian agricultural research (the proposal is to incorporate this within NORAD's main grant to Eldis in the next phase)

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<sup>85</sup> It is acknowledged that IDS (Information Dept?) has previously, unsuccessfully applied for a DFID Partnership Programme Agreement (PPA), but it an engagement along these lines which is considered here, although with multiple donors.

In regard to the last of these points, it is suggested that a minimum target for the Information Dept should be to maintain or increase the level of service, while reducing the DFID proportion of funds to 50% of total.

### 5.11 External factors and Risk management

The MK4D proposal identified the following risks, which covers both internal and external risks (Table 12):

**Table 8. MK4D Table of Risks**

<i>Nature of Risk</i>	<i>Steps to Mitigate Risk</i>
1. Inadequate funding from other sources to complete the work set out in the proposal.	<ul style="list-style-type: none"> <li>• Continue (with DFID support) to champion the importance of knowledge sharing for development</li> <li>• Continue to strengthen links with existing and potential new funders.</li> </ul>
2. The reputation of IDS Knowledge Services suffers because of criticism over the nature of their coverage or the way they operate.	<ul style="list-style-type: none"> <li>• Effective quality control procedures for individual services</li> <li>• Maintaining strong two-way links with users, partners and advisors, so we are alert to potential problems and can deal with them accordingly</li> </ul>
3. Major slowdowns or disruptions occur with the operation of the internet, for example through excessive proliferation of email spam and viruses.	<ul style="list-style-type: none"> <li>• Develop web and email services so they minimise bandwidth requirements, and are as user-friendly as possible</li> <li>• Use print, CD-ROMs, the media and other channels to reach target audiences, so services are not overly reliant on the internet</li> </ul>
4. Development of the new technical platform is substantially delayed or costs escalate.	<ul style="list-style-type: none"> <li>• Careful planning and management of the process, and the sub-contractors involved</li> <li>• Clear prioritisation of which functionality is essential, and which could be developed later</li> </ul>
5. Major disruption occurs in delivery of IDS internet-based services because of systems failure or damage to servers (e.g. fire or flood)	<ul style="list-style-type: none"> <li>• Develop an appropriate disaster recovery strategy including off-site mirroring of key data and systems</li> </ul>
6. Partnerships with other organisations prove difficult to establish or maintain because of competition for funds, incompatible management styles or project models, or problems in exchanging data.	<ul style="list-style-type: none"> <li>• Follow good practice in being open and constructive in engaging with partners, and emphasise importance of good communications and regular face-to-face meetings</li> <li>• Develop clear Memoranda of Understanding with partners</li> <li>• Adopt suitable data standards to facilitate data sharing</li> </ul>
7. Potential synergies between IDS Knowledge Services fail to be realised because of competing service models or brand confusion among users.	<ul style="list-style-type: none"> <li>• Good teamwork, knowledge sharing and coordination between individual services</li> <li>• Cross-cutting activities working to strengthen joint thinking and joined-up strategies</li> </ul>
8. Verifying outcome indicators proves difficult because causal links cannot be unequivocally demonstrated, or resources required to do so are prohibitive.	<ul style="list-style-type: none"> <li>• Working on new and innovative methodologies that provide meaningful but realistically measurable indicators</li> <li>• Commissioning independent surveys where appropriate</li> </ul>

Risks 4 and 8 have eventuated, and risk 7 has had some bearing on performance.

Risk 4 – the delay in new technical platform (Oryx) was partly outside the control of managers in MK4D: the main software contractor stopped trading. However, the complexity of the task and the resultant time and funded needed to develop the platform - partly in house and partly with sub-contractors – were very significantly underestimated, and continued to be underestimated. Deadlines were over optimistic and continued to be re-forecast in fairly small increments into the future. This has had a significant impact on the planned joint working through shared content. It must be a top priority to ensure all the services are operating on Oryx by the end of this phase.

Risk 8 – difficulty in verifying outcome indicators. This risk was always quite likely to eventuate. Although the SLI team have worked hard to put M&E strategies in place, at the Purpose level, the logframe design and the associated data collection approaches have always been misaligned, making outcome verification extremely difficult. MK4D needs to take a more structured approach to impact assessment in the next phase, and lead the M&E from the SLI so that methodologies and data are consistent and comparable, and collected to verify the stated indicators.

Risk 7 – potential synergies and competing service models. There is little evidence that services are competing as their products are quite well differentiated. However, the implicit incentives in the system are towards the projects. The MK4D logframe is owned by the SLI alone. Therefore, while cross-project structures and processes are in place, the envisaged level of synergy has yet to be realised.

## 6. Lessons and Recommendations

Ordinarily, an OPR is an annual exercise, which reviews progress towards achievement of logframe outputs, and makes a limited set of recommendations for the following year in pursuit of that aim. In this case, this first MK4D review comes close to the end of the funding period and at a time when the Information Department is undertaking a larger Strategic Review. This review is thus meant to inform both future funding options for MK4D and the Strategic Review. For these reasons, the recommendations in this section are more extensive than might normally be expected, they are also less incremental than is common in OPRs – they have purposely been framed with the purpose of contributing ideas for the Strategic Review.

### Funding

Research funding has fared well in DFID in recent years, though maintaining a level of staffing to have oversight of that research has been more difficult. The recent pre-budget speech said that: *“The 2007 CSR [comprehensive spending review] provides DFID with the resources to double its research budget between 2005-06 and 2010, to over £200 million per year, strengthening the UK’s leadership in this field. **The Government believes that new technologies and knowledge have the power to increase significantly the impact of international efforts to tackle poverty** [emphasis added]. These additional resources will help the UK establish a strong evidence-base to maximise the effectiveness of development policies, particularly in the priority areas of sustainable agriculture, life threatening diseases, good governance and climate change technology”*.<sup>86</sup>

Furthermore. DFID’s research consultation<sup>87</sup> has stated that it believes research communication is under-funded:

*“4.13 We think that there are not enough international funds to help those who repackaging research knowledge through the media and online publishing. We want to continue to provide support for this, as well as working with international organisations that facilitate information sharing and learning between countries and regions”*

These statements provides a very strong basis for continuing to fund MK4D, though it does very much focus on the need to demonstrate impact. It is **recommended** therefore that DFID does continue to fund MK4D, for a further 3 to 5 years. A third year review could assess progress on marketing, southern partnership and impact assessment as performance triggers for the fourth and fifth years. It is not within the bounds of this review to recommend the level of funding, this should be derived from budgeting the outputs required to achieve the logframe targets, which should be ambitious. Sufficient funding should be earmarked for southern partnership, marketing and M&E. It is expected that funding would be no less than at present.

The pre-budget speech naturally focuses on UK Government expenditure. However, the MK4D funding needs to be considered in a multi-donor context. It is **recommended** that the bundle approach of MK4D and the basket funding models in BRIDGE and Eldis are

<sup>86</sup> Chancellor of the Exchequer (2007). *Meeting the aspirations of the British people*. 2007 Pre-Budget Report and Comprehensive Spending Review. TSO, London

<sup>87</sup> DFID. (2007) Public Consultation Document on DFID’s Research Strategy 2008–2013.

expanded to create a basket fund for the information services as a group. BRIDGE has operated on a basket fund since 2000, and has found that it can help a programme meet identified “public needs” rather than solely the needs of the donor.

A key element of developing basket funding would be DFID and the Information Dept working together to promote a more harmonised approach to funding research communication, in pursuit of **Paris Declaration** aid effectiveness efficiencies. DFID and the Information worked together very successfully in catalysing the multi-donor workshop on improving the effectiveness of development research communication<sup>88</sup>. This partnership should continue, with one of its aims being to develop basket funding for this important area of work. The basket fund may not be restricted to funding IDS – a fund for a cluster of likeminded development research communications organisations could be a goal.

The Information Dept is proposing two follow-up workshops<sup>89</sup> to the 2006 meeting – these will be an ideal opportunity to promote these concepts. An indicator of successful basket finding might be that DFID’s share of the bundle is reduced to 50%.

The move to a single basket fund is not without problems, including persuading the other donors of the merits of applying Paris Declaration principles in the case of MK4D. Other basket fund concerns include:

- **id21**’s current remit to showcase UK-funded research. It is **recommended** that DFID agrees that id21 can expand its scope beyond UK funding. However, this would have to be done on a selected basis as one of id21’s comparative strengths is the depth in which it covers the research it highlights and abstracts – broadening coverage might offset this depth, making id21 more similar to Eldis. Alternatively, it would greatly increase the cost of running id21 if were to maintain depth of coverage and broaden the scope of its source material. Under a basket fund, donors and the Info Dept would need to agree parameters for the scope of id21. If the services become more southern oriented (for example by partnering to create southern id21s), they could showcase research from regional NGOs and Governments
- **Livelihoods Connect** (LC) grew out of DFID’s Policy Division and DFID’s then enthusiasm for the SLA. LC has two main elements – the Network, which fulfils most of the characteristics of a community of practice (CoP)<sup>90</sup>, and its electronic document and news services – email bulletin and website. Both elements are well appreciated. The Network has a loyal but small following, and members appreciate the opportunity to meet face-to-face too. The website has shown a 10% year-on-year increase in unique visits.

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<sup>88</sup> Barnard, G., Carlile, L, and D.B. Ray (2007). *Maximising the Impact of Development Research. How can funders encourage more effective research communication?* Final Report. Based on a Workshop held at the Institute of Development Studies, 16–18 October 2006. IDS.

<sup>89</sup> Barnard (2007) Coordinating Donors Efforts to Encourage More Effective Research Communication. Initial concept note for two follow-up workshops. Draft concept paper.

<sup>90</sup> [http://www.infed.org/biblio/communities\\_of\\_practice.htm](http://www.infed.org/biblio/communities_of_practice.htm)

- Under a basket fund environment there is a potential opportunity to simultaneously build on and evolve the best of LC and to make some efficiency gains. Unlike id21, which produces a distinctly different type of product to Eldis, the news and documents aspects of LC result in product which is more similar to Eldis'. Eldis does not have a livelihoods theme, and thus there might be quite good fit if this component of LC were to be transformed into an Eldis thematic group. This might then mean one less website for Oryx to encompass, and also easier sign-posting and linking to relevant content. Livelihoods is relevant to many themes, and such an arrangement, within Eldis, could facilitate bringing together livelihoods-related material across Eldis. If branding is of concern, it would be possible to point the livelihoods.org URL direct to the thematic group page in Eldis.
- This would leave the Network. Eldis is trying to establish communities through its Web 2.0 portal. There is potentially much mutual benefit to be gained from Eldis and LC working together to take forward innovative approaches to CoPs in the next phase. Eldis' new media approach and LC's proven success with a small, physical community might together yield interesting ideas. At this stage there is no specific recommendation that the LC Network becomes an Eldis Web 2.0 social network, but that is one avenue. Another, contrasting, avenue to consider might be that as a vibrant community, the next phase could examine possible graduation options for the Network to become a stand alone community – a professional association for example. It is also worth noting that the Info Dept is also a partner in DFID's new Livelihoods Resource Centre (LRC), and the Info Dept, DFID and LRC could discuss the options to migrate the Network into the LRC.
- At present there is an important stream of work in the Info Dept, with which the projects interact, but which is not part of the bundle – the Health & Development Information (HDI) team. It is suggested that the possibility of bringing HDI into the basket-funded bundle is examined. This makes administrative sense, and fits with the bundle concept. However HDI's association with DFID's Health Resource Centre (HRC), which was commercially tendered, and this would need to be clarified.
- **BLDS** - the library has previously had a large funding cut from DFID, and its incorporation into the bundle was partly a means to ensure funding to secure continued funding and connect it better to other IDS knowledge services. With DFID having decided to close its own library, there is a clear signal that some parts of the development world are moving away from paper (this may not be true in the south, but it is a signal from a key donor). This may mean DFID places greater value on BLDS, but it can also be interpreted that the funding future leans more to digital resources. There is a view that since the library is the closest to a bricks and mortar service, it is the more difficult to bring into a bundle as it serves a large domestic constituency. However, BLDS has been making strong progress towards improving its accessibility in the South – through promotion of its document delivery service to GDN and southern members of Research Programme Consortia, through increasing its provision of on-line journals, and through appointing an e-content coordinator. Hence there are good arguments for BLDS to continue to be part of the bundle alongside the other services.



### **The Shape of the Bundle**

A radical question, which has been raised in the Information Dept previously, is whether the services should be fully integrated, into what might be termed a mega-Eldis. The review initially considered that there was some merit in the idea, from an efficiency perspective. However, with a better understanding of the services, it is considered that their diversity of approach, audience and subject matter means that the information market is generally better supplied by separate, but well integrated services. Thus rather than amalgamation, better integration, built on a functioning Oryx platform, is indicated, the previous ideas relating to Livelihoods Connect notwithstanding.

However, the review does not consider that 'business as usual + Oryx' is necessarily the most effective and efficient model for going into the next phase. Of the five services, Eldis and id21 are closest together, with Eldis characterised by its volume of output and use, and range of products, and id21 by its depth of coverage and UK orientation. BLDS is a library service, which is making rapid progress towards better serving Southern users. BRIDGE and Livelihoods Connect are both subject-specific services, with BRIDGE having a strong policy level and advocacy perspective, building on a core of well-researched cutting edge packs, and Livelihoods Connect covers a topic not covered by Eldis, and essentially runs a Community of Practice for sustainable livelihoods. Recommendations have been made above in relation to some aspects of the bundle services. It is recommended that projects should not be called projects; this sends a 'project' signal, which does not promote a picture of sustainability.

While the potential merits of bundling the services are not disputed, it is not evident to date that bundling has achieved greater efficiency. Bundle activities, led by SLI, have often been an additional transaction cost for the services. The current phase can be perceived the 'investment' period, with the efficiency and effectiveness dividend due after the Strategic Review, and in the next phase of MK4D. It is recommended that the Information Dept places particular emphasis on identifying practical measures by which the bundle can be managed in the next phase to improve impact, effectiveness, and efficiency.

One suggestion is to alter the role of the SLI, so that it leads on, and is responsible for delivering core services in M&E and marketing. A more directive type of coordination would result in greater focus on the programme goals (rather than project outputs), and improved efficiency by constraining some of the heterogeneity in operations. i.e. uniformity in M&E methods and data. The aim would not be to homogenise the services, which thrive on their diversity, but to harness the individuality of the services towards their communications products. SLI would ensure that the aggregate impact of the services can be demonstrated and that their aggregate reputation is used to market the projects as a family of services.

### **Core Services of the Bundle**

The review has addressed the topic of **M&E** and impact assessment in depth. It is thus **recommended** that the M&E system is refined for the next phase, so that i) it is able to collect data in a suitable format to verify achievement of targets, and ii) it can more robustly

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demonstrate impact – this will entail making a number of suggested improvements to the qualitative / narrative dimension of the M&E system. These improvements need to be in place for the start of the next phase. Developing them should not be seen as a next phase activity.

MK4D has a ‘not seeing the wood for the trees’ problem – there is too much detail and too much data. It needs a more strongly co-ordinated reporting system, with limited sets of key performance indicators (KPIs). The profusion of information is not helped by the profusion of logframes. Multiple, complicated and heterogeneous **logframes** yield similar, but not necessarily integrated or integrate-able sets of data. It is **recommended** that for the next phase of MK4D, there is one MK4D logframe and simpler delivery plans and results framework beneath this for each of the services. It is further **suggested** that the mutual responsibilities of SLI and the projects could be captured in some form of service level agreement, specifying what the projects will deliver and what core services SLI will make available to them.

The review found that the services could be more actively marketed, as awareness was somewhat limited amongst both users and non-users. It is **recommended** that the **marketing** effort is stepped up to reach some stretch targets during the next phase, and that this is led, rather than facilitated, from SLI.

The marketing also needs to more clearly elaborate who are the audience, what is their preferred medium, and what is the message to be communicated. This is not as well defined as one might expect. For example, Eldis’ Business and Communication Model paper asks, in relation to Output formats “*are we too tied to print publishing? Are audio or video more relevant (or have more impact with) our intended audiences?*” It is surprising that market research to date has not identified both the key audiences, and their preferred sources of information. For example, for Ministers in Kenya, what is the equivalent of the 08.10 interview on the Radio 4 Today programme?

It is **recommended** that for the next phase, as part of improving both the M&E and the marketing, the services need to elaborate, and as far as possible agree a combined theory of change for what it is they do, and a set of target users. These can then be used for structuring the M&E and segmenting the marketing.

### **Facilitating the Bundle**

Achieving functional bundling has been seriously affected by the delay in Oryx. This is a kingpin in the process of better integrating the services. There are important lessons to be learnt about internal communications and realistic expectations and timetables, however, given its centrality to integration, it is considered that MK4D management and DFID should have jointly maintained a closer watching brief on progress. This would have enabled them to force the pace, or at least keep to pace, and release more resource if needed. As it is, Oryx has only started to be rolled out, with Eldis, in June 2007, and given teething problems, is unlikely to be fully operation until into 2008. The other services are planned to be ported on to Oryx between March and August 2008. Thus the transfer is meant to be completed by the time this phase of MK4D funding draws to and end in September. However, as with the rest of the Oryx development, this is an optimistic timetable, and it appears more likely that all

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the services will not be fully integrated by this time, as ISU does not want to rush these stages and create possible knock-on problems as a consequence. Thus, it is **recommended** that MK4D and DFID ensure that i) a realistic timetable is developed – recognising this is likely to mean that Oryx development will extend into Year 1 of the next phase, and ii) that having developed a realistic timetable, that it is achieved and Oryx's development does not slip beyond the planned timeframe, so that MK4D can realise the dividend of the Oryx investment in this phase as soon as possible. The aim should be to demonstrate at least three services functioning on Oryx and sharing content by the end of September 2008. However, it is recognised that even when all five services are on Oryx, that the system will need to be steadily refined in the medium and longer term to keep pace with new opportunities and demand.

### **Partnerships and working in the South**

The services have been developed around the Info Dept's expertise. However, this means they are centralised. It is **recommended** that MK4D should make a concerted effort to significantly increase the involvement of southern partners in the info-mediary role. This may result in a more decentralised approach (though this is not promoting setting up sub-Saharan African Info Dept – a 'southern' initiative should not put IDS in competition with local organisations. A greater southern involvement would improve relevance, provide opportunities for more interactive style of communication with users, and potentially increase efficiency.

The complexities (compared with centralised services), time required to develop partnerships and capacities, the costs of establishing partnerships, the potential politics of having multiple organisations involved, and even carbon footprint issues relating to establishing and maintaining partnership, all need to be borne in mind when embarking on a more southern-oriented and partnership-based approach. It is likely that the next three years will be a transition of another kind.

Oryx will facilitate remote editing and content generation. More southern involvement may mean expanding editorial boards and creating new reference groups with whom to interact. Working with southern organisations could involve a range of types of relationship – partners, joint ventures, franchisees, freelance staff, etc. However, the Info Dept will need to consider that services rather than the bundle may be easier to promote with southern partners.

### **Products**

Findings from the review support those in the services' own surveys – that at present the internet is not the preferred communication channel for everyone. Access for those in the south, continues to be difficult, and will not be entirely resolved in the next three year. What ever the technological advancements, information seeking behaviours can be slow to change. Thus paper and CD ROM products will continue to be very relevant in achieving the MK4D Purpose. The services should continue to invest significantly in their production.

However technological change is rapid, and MK4D should support users in developing new web-based learning styles as connectivity improves. MK4D can helps itself by linking users

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to opportunities for hard ware provision and connectivity. [Are their Gates type opportunities here?]

While the new electronic delivery mechanisms, such as RSS, blogs, and web 2.0 ensure that the projects stay up to date with latest developments, MK4D must ensure that it does not lose those users not ready to go the next step, or who primarily utilise paper and CD-ROM versions.

## Annex 1. Mobilising Knowledge for Development - Overall logical framework

Narrative Summary	Verifiable Indicators	Means of Verification	Risks/Assumptions
<b>GOAL:</b>			
<b>Global poverty and injustice reduced as a result of better informed decision-making by development policy makers and practitioners</b>	<ul style="list-style-type: none"> <li>• Recognition of the value of research as a contributor to policy and practice</li> <li>• Use of, and reference to, research and other evidence in policy and planning processes</li> <li>• Diversity of viewpoints taken into account in decision making</li> <li>• Informed debate on development issues within public and professional fora</li> </ul>	<ul style="list-style-type: none"> <li>• Reports on size of research budgets, total amount of research activity (in North and South)</li> <li>• Reports analysing policy documents, implementation plans, public statements, and media coverage</li> <li>• Reports on tracker studies to identify how specific changes in policy or practice were influenced</li> <li>• Reports of surveys of researchers and other knowledge producers to assess their success in getting ideas into policy and practice</li> </ul>	
<b>PURPOSE:</b>			
<b>Development actors increase their use of the global pool of knowledge on development</b>	<ul style="list-style-type: none"> <li>• By September 2008 IDS Knowledge Services used and appreciated by: <ul style="list-style-type: none"> <li>- 15 Southern government agencies</li> <li>- 100 Southern-based NGOs</li> <li>- 50 international NGOs</li> <li>- 10 OECD/DAC aid agencies</li> <li>- 10 multilateral development agencies</li> <li>- 100 research organisations worldwide</li> </ul> </li> <li>• Specific instances where IDS knowledge services have been used and have had a positive impact on the work of development actors</li> </ul>	<ul style="list-style-type: none"> <li>• Reports from individual services on the findings of their monitoring and evaluation activities</li> <li>• Report of aggregated analysis of data gathered through overall monitoring and evaluation strategy</li> <li>• Output to Purpose Review 2007</li> <li>• Independent evaluation of Eldis 2007</li> <li>• Report of internal evaluation of overall marketing strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Policy and practice planners use information on development issues to make decisions that result in a reduction in poverty and injustice</li> <li>• Southern governments increasingly value and have real opportunities to deploy findings from evidence-based research in policies and practice</li> </ul>
<b>OUTPUTS:</b>			

Narrative Summary	Verifiable Indicators	Means of Verification	Risks/Assumptions
<b>1. Knowledge gaps bridged between research, policy and practice</b>	<p>By September 2008:</p> <ul style="list-style-type: none"> <li>• A diverse knowledge base on development which includes a wide range of perspectives and geographical and organisational sources</li> <li>• An accessible knowledge base on development which includes a range of easy to use formats and delivery mechanisms</li> <li>• Specific instances where IDS Knowledge Services have contributed to debates and exchanges among development actors in a range of contexts</li> <li>• Specific instances where IDS Knowledge Services have contributed to gender advocacy and mainstreaming efforts</li> <li>• Specific instances where IDS Knowledge Services have contributed to enhancing understanding of sustainable livelihoods thinking and approaches among development actors</li> </ul>	<ul style="list-style-type: none"> <li>• Reports of cross project analysis drawing together data collected by individual projects (including surveys, case studies, interviews and web statistics).</li> </ul>	<ul style="list-style-type: none"> <li>• Adequate funding raised from DFID and other sources to complete full range of activities planned</li> <li>• See individual logframes for assumptions relating to specific services.</li> </ul>
<b>2. IDS Knowledge Services effectively managed to maximise their combined impact and effectiveness</b>	<ul style="list-style-type: none"> <li>• Cross-project management structures in place and working effectively, with DFID steering group providing periodic oversight and strategy guidance</li> <li>• IDS Knowledge Services achieve their objectives (see individual logframes for each of the five Knowledge Services: id21, Eldis, BLDS, BRIDGE, Livelihoods Connect)</li> <li>• IDS Knowledge Service staff share evidence and lessons with each other about how their work affects the work of development actors in different contexts</li> <li>• IDS Knowledge Services staff design and plan future joint activities and services based on evidence and learning</li> <li>• IDS Information staff respond to users and other stakeholders by connecting the IDS Knowledge Services in ways tailored to stakeholders' needs</li> </ul>	<ul style="list-style-type: none"> <li>• Steering group reports and report of Output to Purpose Review 2007</li> <li>• End of phase reports</li> <li>• Feedback and examples from stakeholders and Information staff.</li> <li>• Evaluation report of collective Strategic Review and Forward Planning process 2007-08</li> <li>• New project proposals</li> <li>• Report of evaluation of overall marketing strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Adequate funding raised from DFID and other sources to complete full range of activities planned</li> <li>• See individual logframes for assumptions relating to specific services</li> </ul>
<b>3. A widespread</b>	<ul style="list-style-type: none"> <li>• Number of contacts agreeing to be contacted regularly</li> </ul>	<ul style="list-style-type: none"> <li>• Report of internal evaluation of</li> </ul>	<ul style="list-style-type: none"> <li>• Internet access in</li> </ul>

Narrative Summary	Verifiable Indicators	Means of Verification	Risks/Assumptions
<b>awareness of the collection of IDS Knowledge Services amongst development actors, especially in the South, through marketing and relationship-building</b>	<p>with information from all the IDS Knowledge Services increased from 300 to 1000 by September 2008</p> <ul style="list-style-type: none"> <li>At least 20 new contacts based in organisations in low to middle income countries and at least 10 new contacts based in international organisations have promoted IDS Knowledge Services to their networks</li> <li>Partners give open and honest feedback to IDS about its Knowledge Services</li> </ul>	<p>overall marketing strategy</p>	<p>developing countries continues to improve</p> <ul style="list-style-type: none"> <li>Development agencies continue to emphasise importance of knowledge as a component in development, and provide adequate incentives and space for staff to read and learn</li> <li>IDS retains its reputation as a source of high quality information and a trusted knowledge intermediary within the development community</li> </ul>
<b>4. IDS Knowledge Services are able to demonstrate how they have contributed towards bridging knowledge gaps between research, policy and practice and are able to apply this learning to their collective future practice.</b>	<ul style="list-style-type: none"> <li>Projects are implementing evaluation plans by the end of 2006</li> <li>An overall Knowledge Services evaluation plan is being implemented by the end of 2006</li> <li>IDS Information staff able to draw on and share lessons amongst themselves and the wider development information community about approaches, methods and skills for monitoring and evaluation by the end of 2007</li> <li>Reference to lessons from past experience (successes and failures) in project proposals for future programmes by the end of 2007</li> </ul>	<ul style="list-style-type: none"> <li>Report of internal evaluation of implementation plans of individual services and the overall Knowledge Services</li> <li>Progress reports providing quantitative and qualitative evidence of what has been achieved</li> <li>Report of overall monitoring and evaluation strategy</li> <li>Analysis of project proposals for the quality of these references</li> </ul>	<ul style="list-style-type: none"> <li>More rigorous monitoring and evaluation methodologies will yield anticipated benefits</li> <li>Activity plans are flexible enough to respond to monitoring and evaluation findings</li> </ul>
<b>5. Improved</b>	<ul style="list-style-type: none"> <li>An analysis of the information and communication</li> </ul>	<ul style="list-style-type: none"> <li>Research reports</li> </ul>	<ul style="list-style-type: none"> <li>Practical lessons can</li> </ul>

Narrative Summary	Verifiable Indicators	Means of Verification	Risks/Assumptions
<b>understanding of information, communication and knowledge dynamics. Lessons learned about how intermediaries (such as IDS) affect these dynamics</b>	<ul style="list-style-type: none"> <li>problems affecting the work of selected development actors involved six development issue areas available by August 2007</li> <li>Proposals for the next programme phase have clear definitions of core concepts such as 'knowledge', 'communication' and 'intermediary'</li> <li>Proposals for next programme phase include clear statements of how the programme relates to changes in information and communication problems</li> <li>Research findings shared with key peer organizations in the development information community</li> </ul>	<ul style="list-style-type: none"> <li>Research project documentation</li> <li>Progress reports</li> <li>Review of proposal documents</li> <li>Publications/workshop reports</li> </ul>	<ul style="list-style-type: none"> <li>be drawn from research findings</li> <li>Project staff at IDS and in other organizations are willing to engage with research findings and think strategically about the outcomes of their information and communications work for specific stakeholder groups in specific contexts</li> </ul>
<b>6. Enhanced capacity of Southern organisations to improve their stakeholders' access to, and use of, development knowledge through information and communication interventions</b>	<ul style="list-style-type: none"> <li>Clear understanding of how IDS Knowledge Services can support capacity development of Southern organisations in the next phase</li> <li>Specific instances where Southern organisations have drawn on evidence, and shared lessons about, information and communication interventions in their information communication programme planning as a result of advice, facilitation or partnership with IDS Knowledge Services by September 2008</li> </ul>	<ul style="list-style-type: none"> <li>Strategy documents and progress reports</li> <li>Feedback reports from partners</li> <li>Partners' programme documentation</li> <li>Evaluation reports of capacity building initiatives</li> </ul>	<ul style="list-style-type: none"> <li>Partner organizations are engaged in information and communications as part of their development work</li> </ul>
<b>7. A powerful &amp; versatile new technical platform that allows content to be managed, shared and accessed by users more effectively</b>	<ul style="list-style-type: none"> <li>The new "Oryx" system in use by Eldis by early 2006 and rolled out across other services subsequently.</li> <li>The "Ibex" library system search facility in use by early 2006, with the remaining functionality introduced subsequently</li> </ul>	<ul style="list-style-type: none"> <li>Progress reports</li> <li>Launch and operation of relevant websites</li> </ul>	<ul style="list-style-type: none"> <li>The technology selected can deliver the outputs to users.</li> </ul>

Narrative Summary	Verifiable Indicators	Means of Verification	Risks/Assumptions
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Narrative Summary	Verifiable Indicators	Means of Verification	Risks/Assumptions
<b>ACTIVITIES:</b>			
<b>Activities for Output 1: Services</b>			
1. See individual proposals and log frames for specific activity plans for Eldis, id21, BRIDGE, BLDS and Livelihoods Connect			
<b>Activities for Output 2: Management</b>			
2.1 Establish coordinated management of programme, including coordinated financial planning and reporting mechanisms	<ul style="list-style-type: none"> <li>• Head of Information able to accurately forecast expenditure across the MK4D services by July 06</li> </ul>	<ul style="list-style-type: none"> <li>• Financial forecasting protocol documents</li> </ul>	<ul style="list-style-type: none"> <li>• Management staff and structures have sufficient capacity to adjust to increased management workload that increased coordination requires</li> </ul>
2.2 Establish central unit (Strategic Learning Initiative) to coordinate cross cutting activities and contribute to the management of the group of Services as a whole	<ul style="list-style-type: none"> <li>• SLI is meeting its milestones and deliverables as specified in its work plan</li> <li>• Regular programme of Interchange (IDS) sessions coordinated by SLI, with Information staff and external people contributing to and participating in the programme by Oct 2006</li> </ul>	<ul style="list-style-type: none"> <li>• SLI's planning and reporting documentation</li> <li>• SLI monitoring reports</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge Service staff see the benefits of taking an holistic perspective of the IDS Knowledge Services and are willing to contribute to and accept contributions from each others' work</li> </ul>
2.3 Create structured opportunities and spaces for knowledge-sharing across services, IDS and wider information community	<ul style="list-style-type: none"> <li>• Work plan for strategic review and design of new phase in place by March 07</li> </ul>	<ul style="list-style-type: none"> <li>• Strategic review documentation</li> </ul>	
2.4 Develop a collective process of strategic review, lesson learning from project staff, stakeholders, users and partners, and design of new phase programmes, to be facilitated by SLI between March - Dec 2007			
<b>Activities for Output 3: Marketing</b>			
3.1 Develop, implement and evaluate an overall marketing strategy, including production and distribution of the 'Good	<ul style="list-style-type: none"> <li>• At least 50% of the indicators in the overall marketing strategy achieved by August 07.</li> <li>• Marketing Coordinator invited to contribute</li> </ul>	<ul style="list-style-type: none"> <li>• Reporting on overall marketing strategy, version dated November</li> </ul>	<ul style="list-style-type: none"> <li>• There is a substantial untapped demand that can be reached through more marketing</li> </ul>

Narrative Summary	Verifiable Indicators	Means of Verification	Risks/Assumptions
Place to Start' guide to development information online	to at all IDS Knowledge Services' strategic planning processes by August 2007	2006	• The strategy and direction of the individual knowledge services remain in harmony so services complement each other rather than competing
3.2 Provide strategic leadership, guidance and skills support to marketing activities in each of the services	• Increase from 0 to 10 in the number of instances of the Marketing Coordinator's advice being sought at planning stages of activities and subsequent ongoing contact maintained with marketing staff in individual services by August 2007	• SLI monitoring reports	
3.3 Establish and maintain relationships with organizations around the world for promotion of IDS Knowledge Services to their networks.			
<b>Activities for Output 4: Evaluation</b>			
4.1 Develop and implement an overall monitoring and evaluation strategy to assess the indicators, including analysis of IDS Knowledge Services against findings of case study research project	• Overall monitoring and evaluation strategy and implementation work plan reviewed and revised by February 2007	• Revised M&E strategy and individual services' M&E strategies	• The projects are able to accommodate more rigorous and expanded M&E activities within their project resource and staffing frameworks
4.2 Provide strategic leadership, guidance and skills support to monitoring and evaluation activities in each of the services	• M&E Coordinator invited to contribute to all IDS Knowledge Services' strategic planning processes by August 2007	• SLI monitoring reports	
4.3 Organize skills training and a monitoring and evaluation community of practice for IDS Information staff	• At least one skills training workshop held by December 2006	• Workshop report	
	• Individual knowledge services are contributing to overall M&E framework by collecting data on 5 common evidence areas relating to users from March 2006: <ul style="list-style-type: none"> <li>- Country of residence</li> <li>- Organization type</li> <li>- Users' likes about service</li> <li>- Description of users' work</li> <li>- Effects of use of service on users' work</li> </ul>		
<b>Activities for Output 5: Research</b>			
5.1 Map out an information and communication research agenda	• Conceptual framework paper produced by December 2006	• Publication/report	• Suitable methodologies can be developed to make knowledge sharing a "researchable" subject
5.2 Implement case study research project	• By July 2007, at least 30 case profiles (from	• Project documentation and reports	

Narrative Summary	Verifiable Indicators	Means of Verification	Risks/Assumptions
to map out dynamics of information and communication amongst development actors	<ul style="list-style-type: none"> <li>0) of development actors produced and analysed from explorations of six development issue areas.</li> <li>At least 2 (from 0) stakeholder group discussions from the above issue areas produced and analysed by July 2007</li> </ul>		<ul style="list-style-type: none"> <li>Other organisations are willing to cooperate in exploring these issues</li> <li>Additional funds available to expand research activities beyond the basic programme set out in the budget</li> </ul>
<b>Activities for Output 6: Capacity Development</b>			
6.1 Assess capacity building needs and identify potential IDS niche(s)	<ul style="list-style-type: none"> <li>Capacity strategy tested and potential partners scoped in East Africa, including 6 weeks of placement and organization visits in East Africa, by December 2006</li> </ul>	<ul style="list-style-type: none"> <li>Report of placement, list of potential strategic partners</li> </ul>	<ul style="list-style-type: none"> <li>Potential Southern partners receptive to approaches from IDS and interested in improving their capacity</li> </ul>
6.2 Develop and pilot core elements of the multi-level capacity development programme	<ul style="list-style-type: none"> <li>Skills mapping of Information staff completed by December 2006</li> <li>At least 50% of the milestones in the capacity implementation work plan achieved by December 2007</li> </ul>	<ul style="list-style-type: none"> <li>Skills mapping documentation</li> <li>Progress report</li> </ul>	<ul style="list-style-type: none"> <li>Additional funds available to expand capacity building work beyond the basic programme set out in budget</li> </ul>
<b>Activities for Output 7: Technical platform</b>			
7. Complete Oryx/lbex system development work and roll out the new systems	<ul style="list-style-type: none"> <li>Migration schedule for individual programmes to move to new system in place by January 2007</li> </ul>	<ul style="list-style-type: none"> <li>Project documentation</li> </ul>	<ul style="list-style-type: none"> <li>Technical development work goes reasonably smoothly with no major disruptions or setbacks</li> </ul>
MK4D: Mobilising Knowledge for Development SLI: Strategic Learning Initiative			<b>Version 20 April 2007.</b>

## Annex 2. Summary of MK4D and Project Logframes

	<b>MK4D</b>	<b>BLDS</b>	<b>BRIDGE</b>	<b>Eldis</b>	<b>id21</b>	<b>Livelihoods Connect</b>
<b>G</b>	Global poverty and injustice reduced as a result of better informed decision-making by development policy makers and practitioners	Global poverty and injustice reduced as a result of better informed decision-making by development policy makers and practitioners	Global poverty and injustice reduced as a result of better informed decision-making by development policy makers and practitioners	Better informed, pro-poor decision-making by development policymakers and practitioners	Global poverty and injustice reduced as a result of better informed decision-making by development policy makers and practitioners	Global poverty and injustice reduced as a result of better informed decision-making by development policy makers and practitioners
<b>P</b>	Development actors increase their use of the global pool of knowledge on development	To strengthen and provide wider access to the knowledge base of printed documentation and related online resources relevant to tackling poverty and injustice	To support advocacy and mainstreaming efforts to achieve gender equality by bridging the gaps between research, policy and practice with accessible and diverse information	Development practitioners use and exchange relevant, evidence-based development knowledge and documentation, using ICT-enabled communication channels	To enhance the communication and use of evidence-based development research	1) To enable practical implementation of sustainable livelihoods approaches as a tool for achieving poverty reduction through facilitating knowledge sharing and networking between researchers, policy makers and practitioners. 2) To enhance the profile and influence of sustainable livelihoods concepts in the development sector as a result of continued refinement of SLA and application in new contexts.
<b>OP1</b>	Knowledge gaps bridged between research, policy and practice	A rich collection of published and unpublished print documentation on development, covering a broad range of topics and specialising in material produced in developing countries, that is easy to access and use by both local and remote users	Wider and more nuanced understanding of the importance and relevance of gender equality in its own right and its importance to the priority themes of the development community, through the provision of information/services.	A range of ICT-enabled development information services, integrated through a web portal site	UK-originated development research published in concise and accessible formats appropriate to professional, non-academic audiences	Increased awareness and profile of sustainable livelihoods approaches amongst researchers, policy makers and practitioners as a result of improved marketing of Livelihoods Connect services.

	<b>MK4D</b>	<b>BLDS</b>	<b>BRIDGE</b>	<b>Eldis</b>	<b>id21</b>	<b>Livelihoods Connect</b>
<b>OP2</b>	IDS Knowledge Services effectively managed to maximise their combined impact and effectiveness	More extensive knowledge sharing partnerships with other organisations and initiatives, particularly those in developing countries	Production as well as wide and free dissemination of relevant, diverse and accessible gender information, in an appropriate format, to those that need it to further gender equality goals.	Editorial and commissioning policy ensures the inclusion in services of a broad range of information (reflecting a diversity of viewpoints, and covering a wide variety of topical development issues and debates)	Majority of publicly available, evidence-based, policy relevant, UK-originated research covered by id21	Enhanced understanding and/or improved or adapted practice of sustainable livelihoods concepts and approaches amongst researchers, policy makers and practitioners as a result of learning, exchange and debate facilitated by Livelihoods Connect
<b>OP3</b>	A widespread awareness of the collection of IDS Knowledge Services amongst development actors, especially in the South, through marketing and relationship-building	Closer collaboration between BLDS and other IDS departments	Increased networking amongst the gender and development community (including between policy makers and practitioners, and South-North, South-South etc) to share information and expertise, and to build capacity.	Eldis is widely available to development practitioners as one of the places that development actors seek trustworthy information and which they use to distribute their own information products		A more connected international community of livelihoods researchers, policy makers and practitioners as a result of increased membership, dialogue and collaboration within the Livelihoods Network
<b>OP4</b>	IDS Knowledge Services are able to demonstrate how they have contributed towards bridging knowledge gaps between research, policy and practice and are able to apply this learning to their collective future practice.	Monitoring and Evaluation system established	Policymakers, practitioners and advocates supported by meeting their specific gender information needs (prioritising funders and Southern-based users), through the BRIDGE Helpdesk.	Services provide improved coverage of southern-produced content and show increased usage from southern countries		Staff / partners of organisations funding Livelihoods Connect better able to access, utilise and communicate key information and policy message on sustainable livelihoods as a result of access to bespoke services (Hot Topics, Enquiry Desk Service, Desk Research, Private Web Space, Knowledge Sharing advice / facilitation)

	<b>MK4D</b>	<b>BLDS</b>	<b>BRIDGE</b>	<b>Eldis</b>	<b>id21</b>	<b>Livelihoods Connect</b>
<b>OP5</b>	Improved understanding of information, communication and knowledge dynamics. Lessons learned about how intermediaries (such as IDS) affect these dynamics		Effective and motivated BRIDGE team with the right mix of skills to deliver outputs, including by working with partners.	Eldis contributes to the development and improvement of other information services		Livelihoods Connect enhances its role of making sense of the global knowledge pool on sustainable livelihoods approaches by responding to demands and opportunities for new ways of facilitating knowledge sharing, dialogue and collaboration.
<b>OP6</b>	Enhanced capacity of Southern organisations to improve their stakeholders' access to, and use of, development knowledge through information and communication interventions			M and E system suggests directions for Eldis programme development		
<b>OP7</b>	A powerful and versatile new technical platform that allows content to be managed, shared and accessed by users more effectively					

## Annex 3. Summary Output Statistics

BLDS				
Email subscriptions by Subject <sup>91</sup>				
Subject	Total subscriptions 2005	Total subscribed	Total subscriptions 2006	Total subscribed
Biodiversity, environmental conservation	33	241	21	257
Children	19	181	38	218
Conflicts, disasters, refugees	31	249	53	294
Economic policy	43	381	40	411
Education	33	303	44	341
Gender	42	371	58	424
Governance, civil society	61	463	61	511
HIV/AIDS	30	227	36	259
Microfinance	28	248	32	271
Participation	51	419	60	471
Population, demography	17	188	29	213
Poverty	59	534	62	583
Sustainable livelihoods	50	446	52	491
Trade policy	29	268	29	288
Water, irrigation	27	184	25	201
<b>Total subscriptions</b>	<b>553</b>	<b>4703</b>	<b>640</b>	<b>5233</b>
<b>Online registrations</b>	<b>98</b>	<b>105</b>	<b>105</b>	<b>1160</b>

Email subscriptions by User Type	
Organisation Type	Number of Subscribers
Research/teaching	302
NGO	165
Government	84
International Organisation	70
Consultant	46
None of these	38
Individual	32
Bilateral aid agency	30
Commercial/business	10
Media	4
Parliament/political party	1

BRIDGE			
Subscribers to print copies of <i>In Brief</i> (many also receive copies of the Cutting Edge Packs)			
	Aug-03	Mar-06	Mar-07

<sup>91</sup> data from Lyris - Please note the data below is collected via voluntary fields in the web forms used for subscribing. Therefore, it is not comprehensive - a user may choose to ignore the fields or may subscribe via email not the web.

Africa (AF)	1294	27.7%	1884	29.7%	1977	29.6%
East Asia (EA)	388	8.3%	682	10.8%	698	10.5%
Latin America & Caribbean (LAC)	868	18.6%	931	14.7%	953	14.3%
Middle East (ME)	148	3.2%	177	2.8%	215	3.2%
Pacific (PAC)	71	1.5%	92	1.5%	94	1.4%
South Asia (SA)	693	14.8%	901	14.2%	947	14.2%
CIS/Russia (CIS)	25	0.5%	29	0.5%	29	0.4%
Eastern Europe (EE)	82	1.8%	100	1.6%	92	1.4%
North America (NA)	316	6.8%	415	6.5%	443	6.6%
Western Europe (WE)	788	16.9%	1127	17.8%	1220	18.3%
<b>Total all</b>	<b>4673</b>	<b>100%</b>	<b>6338</b>	<b>100%</b>	<b>6668</b>	<b>100%</b>
<b>Total Southern Countries</b>	<b>3569</b>	<b>76%</b>	<b>4796</b>	<b>76%</b>	<b>5005</b>	<b>75%</b>

### Cutting Edge Packs- Dissemination of free print copies

No.	Notes
Gender and Sexuality	1710 Free copies sent to N and S orgs
Gender and trade (launched Feb 06)	1340 Includes those involved in WTO negotiations. In addition over 10,000 copies of the Gender and Trade issue of <i>In Brief</i> (paper and electronic, in all languages) have been disseminated
Gender and Migration (launched Oct 05)	1055 76% to Southern institutions

### Email updates and CD-Roms

Email updates	3700 subscribers
BRIDGE publications and website CD Rom	7000
Gender and budgets CD-Roms	~10,000 With UNDP

### Eldis

#### Eldis OnDisc

Region (IDS classification)	Total of Organisations sent CD(s) <sup>92</sup> (up to July 2007)	% of Organisations
Sub-Saharan Africa	673	38.3
South Asia	438	24.9
Western Europe	240	13.7
South East Asia	118	6.7
North America	103	5.9
South America	47	2.7
Australasia and Japan	34	1.9
Caribbean and Central America	28	1.6
North Africa	21	1.2
West Asia	19	1.1
East Asia	10	0.6
Eastern Europe	10	0.6
Pacific	9	0.5
Former Soviet Union	7	0.4
	South %	78.5
	North %	21.5

<sup>92</sup> Includes some organisations sent more than one disc for on-distribution



Email updates (Jan '02 – Jul '07 <sup>93</sup> )		
	No.	%
<b>Subscribers</b>	36,250	
Northern	15,391	42.5%
Southern	20,859	57.5%
<b>Number different countries</b>	231	

Livelihoods Connect			
Product	Reach	Time period data covers	Notes
Email bulletin	3400 subscribers	April 06- March 07	One update sent a month. 582 new subscribers in time period
Distance Learning Guide Downloads	502 downloads	April 06- March 07	
Distance Learning Guide CD-Rom	~2	No records kept before Jan 07	Approx 1 request/month
People Centred Development CD Rom	~6	January - June 07	
Email requests	37	May 06- March 07	
Enquiry service	76 enquiries	Past 12 months	Increased by 193% over time period
Livelihoods Network	144 members	2005-2007	

<sup>93</sup> The data is collected via voluntary fields in the web forms used for subscribing. It does not reflect the current profile of the subscribers - it is a partial snapshot of users at the point at which they subscribe.

## Annex 4. Definition of Web Statistics

**Visits**: A visit is series of one or more page impressions, served to one user, which ends when there is a gap of 30 minutes or more between successive page impressions for that user. This is a frequency metric and helps to answer the question 'How often?'

Although a visit cannot tell you how many people are using your site, it is generally seen as a more robust metric and combines both use of the site (page impressions) and reach of the site (visitors).

**Visitor** ( 'unique user' in abce): A visitor is a unique computer IP address This is an audience reach metric and helps answer the question 'how many?'. This measurement is not perfect because IP addresses do not always have a one-to-one correlation with computers or people. Visitors will be under-reported because of proxy servers that have many people using the same IP address, and over-reported because of online service providers that have one person using multiple IP addresses.

The number of visitors cannot be calculated for the whole time period by adding up the monthly figures as this will double count repeat visitors. Similarly visitor numbers cannot be added up between sites. The total number of unique users over a one year period is calculated separately and given below. The percentage of repeat visitors over a one year period is also given.

**Page requests** ('page impression' in abce): A page request (impression) is a file, or combination of files, sent to a valid user as a result of that user's request being received by the server. This is a volume metric and helps to answer the question 'how busy?'

Both the design of a web site and its number of graphics will affect the number of file requests it receives. Page requests are also difficult to interpret as we cannot tell from the figures whether a high number of requests is good (because someone is staying on the site and looking at lots of pages) or whether a low number would be better (because people can quickly and easily navigate around the site and get the information they want). Page impressions won't be counted for cached sites.

Page requests/impressions replaces the old metric of 'hits' (or 'requests') which counted every file request. Figures for 'hits' were entirely dependent on the design and layout of the web page.

## Annex 5. Target users

This table is a compilation of the top ten target users identified by each of the five services. They were asked to identify particular roles within specific types of agency. The weighted count counts the top three actors from each service as double. The rows and columns are sorted according to weighted importance.

Development Actors	Southern NGOs	Education Orgs	Research Orgs	Southern Govt	DAC Agencies	Multi-lateral Agency	INGO	Southern Consultancy	Northern Consultancy	Business	Media	KS count	Weighted KS count
Role of Target Users*	E	E	E	E	E	E	E	E		E			
Research	B LC	B LC	B id21 LC	id21	B	B						10	13
Advisory				id21 BR	LC BR	LC BR	id21	id21				8	12
Practical action	id21 LC BR			id21	BR	LC BR	LC					8	10
Advocacy	id21 LC BR						LC BR					5	7
Information/Communication	B	B	B		B	B						5	7
Training/Education	BR	ID21 BR										3	3
Management						id21						1	1
KS count	11	6	5	5	6	8	5	2	0	1	0		
Weighted* KS count	14	9	9	8	8	8	6	2	0	1	0		

## Annex 6. List of people met

Name	Name of the organization
Geoff Barnard	Head of Department, Information Department, IDS
Isabel Vogel	Project Manager – SLI
Anna Downie	M&E Coordinator
Cheryl Brown	Marketing Coordinator
Catherine Fisher	Capacity Development Coordinator
Julie Brittain	Project Manager – BLDS
Hazel Reeves	Project Manager – BRIDGE
Peter Ferguson	Project Manager – Eldis
Alistair Scott	Project Manager – id21
Helen Schneider	Project Manager – Livelihoods Connect
Debbie Beer	Project Manager – ISU
Alan Stanley	Senior Editor – Eldis
Louise Daniel	Senior Editor - id21
Maggie Ibrahim	Livelihoods Connect
Duncan Edwards	Interne Information systems Manager- ISU
Dylan Winder	DFID: Head of Communications, CRD; Head of Office, Tajikistan
Abigail Mulhall	DFID: Acting Head of Communications, CRD
Stephen Latham	DFID: Head of Knowledge and Information

### A. List of persons interviewed in country studies and respondents top counterfactual web-survey

#### Bangladesh 4-12.8.07

Name	Name of the organization
Ruhul Chowdhury	Researcher, BRAC University
Aniruddha Hom Roy	Project Management Specialist, USAID
Mahbubul Islam Bhuiyan	Research Associate, ICDDR,B
Dilruba Mahbuba	Librarian, ICDDR,B
Dr. Sujit Kumar Bala	Associate Professor, Institute of Water and Flood Management, Bangladesh University of Engineering and Technology
Afsana Wahab	Executive Director, Centre for Woman & Child Development
Mokhlesur Rehman	Executive Director, CNRS
Md. Mehrul Islam	CARE Bangladesh
Andrea Rodricks	Assistant Country Director, CARE Bangladesh
Rakibul Amin	Director, IUCN Bangladesh
Dr. Mizan	Director, School of Environmental studies, North South University
Dr. Riaz Khan	Visiting Professor, North South University
Manjurul Hannan Khan	Bangladesh Administrative Services (on leave for PhD studies at the University of Manitoba)
Najir Ahmed Khan	Deputy Programme Manager, DFID
Dr. Khaled Shamshul Islam	Sr. Assistant Chief, Ministry of Health and Family

	Welfare
Sarwat Masud Reza	Librarian, British Council
Md. Abdul Hamid, PhD	Managing Director, Tropical Development Associates
Afsan Chowdhury	Director, Advocacy & Human Rights, BRAC
Sabina Faiz Rashid	Lecturer, BRAC University
K.M. Enamul Hoque	Programme Manager, Campaign for Popular Education
Zaki Hasan	Programme Officer, Save the Children
Khandaker Reaz Hossain	Logistics Support Officer, John Snow Inc. & Advisor, Resource Integration Centre
Abu Nayeem	Chief Programme Coordinator, Resource Integration Centre
Prof. Simeen Mahmud	Senior Fellow, Bangladesh Institute of Development Studies
Aminul Islam Rokon	Training Specialist, Training and Technology Transfer Bangladesh

**Malawi 13-17.8.07**

<b>Name</b>	<b>Name of the organization</b>
Noel Jambo	Bunda college
Catherine Chibwana	Bunda College
V.A.L Mkandawire	JICA
Dr. Adunga gebede	CRS
Mercy Mbamba	NASFAM
Hilda Kabuli	Chitedze research Station
Amon Kabuli	I - Life Programme
Andrew Namakhoma	NASFAM
Kondwani Hara	Bunda College
Margeret Ngwira	College of Nursing (LL)
George Kayange	CRIDOC

**Tanzania 6-9.8.07**

<b>Name</b>	<b>Name of the organization</b>
1. Venance Mutayoba (Mr)	The Mwalimu Nyerere Memorial Academy
2. Mathias Mponda (Mr)	Ministry of Agriculture
3. Tibero Mdendemi (Mr)	Institute of Rural Development Planning
4. Isaria Mwende	Ministry of Agr. Food Security and Cooperative
5. Godfrey Tweve	PACT Tanzania
6. Abdallah Hassan (Mr)	ESRF
7. Alawy Bakar (Mr)	The Pemba Island Relief Organisation (PIRO)
8. Walter Mbaula	African Institute for Capacity Development
9. Fikiri Malembeka	Musoma District Council
10. Yuster Kibona (Ms)	Environmental Protection and Management Services
11. Farida Issa	S.I.S.I- Strategic Initiatives for Social Improvement
12. Pantaleon Shoki	Agency for Cooperation and Research in Dev.
13. Federica	CUAMM
14. Albert Jimwaga	Pastoral Network of Tanzania
15. Mathew N.H Tambukwa	World Vision
16. Edmund Michael	Kiwira Prisons College

Name	Name of the organization
17. Dr Maggie Ngaiza and Prof Mlama	IDS, Univ of Dar es Salaan

**Respondent to counterfactual web-survey**

Your name	What is your Job Title?
George I. Abalu	Managing Consultant
Weijie Deng	Consultant for Conservation & Development projects (Independent)
Nick Innes-Taylor	Coordinator, AIT Aqua Outreach Program
Anna Lawrence	Senior Research Fellow
Munhamo Chisvo	Managing Director
Alan Brooks	Regional Director
Smita Shweta	Programme Assistant
Arvind Kumar	Senior consultant
Reshmee Guha	Consultant
Prasanna	Independent Consultant
Graeme Macfadyen	director, Poseidon
Tom Franks	Professor
William Savage	Organizational and Community Development Facilitator
Paul Bulcock	Research Associate
Rachel Percy	Consultant in Collaborative Rural Development
Jan Peter Johnson	Coordinator, FAO Livelihoods Support Programme
Matthew Briggs	Asian Technical Director
Virinder Sharma	Environment and Livelihoods Adviser
Stephen Tembo	Director of Projects
Keri Keelan	Head of Year 4
Sudin K	Technical Support Expert
Maria Paalman	Independent consultant
Patricia Norrish	Consultant
Bhawani Sankar Panda	Programme Assistant, Fishery Science
MBE Tawe Alex Nicanor	Student
Muhammad Junaid wattoo	Project Design and Monitoring Officer
Cecile Brugere	Fishery Planning Analyst
Buenafe Abdon	PhD Student
M.I.Zuberi	Professor
Ashish Kumar	Deputy Director of Fisheries
M. Moazzam Khan	Director (Planning and Statistics)
Stuart Bunting	Senior Scientific Officer
Georgina Cairns	science communications consultant
Elga Salvador	community mobilizer
Hema Pillai	Office Manager
Venkatesh Salagrama	Director
Cathy Hair	Senior Fisheries Biologist
Victor Parlicov	Free-lance consultant
Kath Copley	Consultant
James Dalton	Integrated Water Resource Management Adviser
Nguyen Song Ha	Communications Hub Manager

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Terri Sarch	Livelihoods Adviser
Muhammad J. Chiroma	Research Officer

## Annex 7. List of documents consulted

Documents provided by IDS:

Name of document	Project
Web statistics	All projects
Project self evaluation (using OPR form)- BLDS	BLDS
Matrix of target users- BLDS	BLDS
Supporting documents for BLDS OPR form	BLDS
BLDS logframe (revised from original)	BLDS
BLDS services summary	BLDS
Model of service for BRIDGE	BRIDGE
Editorial style guide- BRIDGE	BRIDGE
Searching and database guide- Siyanda	BRIDGE
Review of BRIDGE M&E- 2002 to 2007	BRIDGE
Project self evaluation (using OPR form)- BRIDGE	BRIDGE
BRIDGE logframe	BRIDGE
BRIDGE bringing the strands together- views on theory of change	BRIDGE
BRIDGE evaluation report 1999 by CIC	BRIDGE
BRIDGE editorial guidelines- style guides and checklists of materials	BRIDGE
Matrix of target users- BRIDGE	BRIDGE
Background paper: Supporting the formation of online communities using social networking and other community tools, including Web 2.0 opportunities	Eldis
Eldis other services comparison for benchmarking	Eldis
Eldis audiences and target users matrix	Eldis
Eldis editorial policy and guides- various documents	Eldis
User bios	Eldis
What Eldis aims to do	Eldis
Eldis revised M&E strategy March 07	Eldis
Briefing note on Eldis bios	Eldis
Sample bio- draft version (long and short)	Eldis
Eldis report 2003-06	Eldis
Eldis report 2005	Eldis
Eldis report 2003	Eldis
Eldis report 2002	Eldis
Eldis report 2001	Eldis
Eldis proposal to SDC- 2007-10 (with budget)	Eldis
Eldis proposal phase 3 post DFID joining	Eldis
Eldis proposal phase 3 pre DFID joining	Eldis
Trade resource guide user survey draft report	Eldis
Eldis Espanol survey summary report	Eldis
What do we know about Eldis users?	Eldis
Queries and further info from Eldis	Eldis
Eldis Cache CDROM feasibility study	Eldis
Eldis whole service survey 2003	Eldis
Poverty Resource Guide Survey 2003	Eldis
Project self evaluation (using OPR form)- Eldis	Eldis
Background paper: Eldis communication and business model	Eldis
Background paper: Statistical analysis of usage of Eldis services	Eldis
Background paper: Statistical analysis of Eldis production statistics	Eldis
Id21 Marketing Research, Bangladesh	id21
Model of service for id21	id21
Id21 Evaluation 1999	id21



Id21 Progress Report March 05	id21
Insights user survey- Analysis and report produced by Pexel Feb 07	id21
id21 news user survey 2006	id21
Telephone survey of contributors to id21	id21
id21 Report on use of Insights Health Guide (Palliative Care) at the International AIDS 2006 conference, Toronto	id21
Impact assessment and market research in India (2006)- In-depth interviews with 15 users	id21
Online Content Tracking Report 2006	id21
Report on feedback received on id21 2006	id21
Matrix of target users- id21	id21
Editorial guidelines for i21	id21
Project self evaluation (using OPR form)- id21	id21
id21 Logframe	id21
id21 progress report March 05	id21
IDS Strategy 2005-2010; Knowledge for a Better World	IDS
IDS Annual Report 2005-06; Reinventing Development Research	IDS
A shortish history of the information department	Info Dep
Update on the IDS Information Department	Info Dep
A rolling strategy for the Information Department at the Institute of Development Studies 2003-2006	Info Dep
Maximising the Impact of IDS Knowledge Services	Info Dep
IDS Information Department Organogram	Info Dep
Information Unit Strategy Process: Why do we need a strategy?	Info Dep
Oryx documents	ISU
Livelihoods Connect Phase 1 Review by Communiq (2001)	L'hoods Ct
Model of service for Livelihoods Connect	L'hoods Ct
Editorial policy- Livelihoods Connect	L'hoods Ct
Project self evaluation (using OPR form)- Livelihoods Connect	L'hoods Ct
Livelihoods Connect progress report	L'hoods Ct
Livelihoods Connect proposal including logframe	L'hoods Ct
DfID Africa advisors user survey and report	L'hoods Ct
Matrix of target users- Livelihoods Connect	L'hoods Ct
MK4D Progress reports to DFID 05 and 06	MK4D
MK4D Proposal	MK4D
MK4D Stories of Use	MK4D
MK4D self evaluation (using OPR form)	MK4D
MK4D logframe (revised April 07)	MK4D
MK4D details of web stats	MK4D
id21 Product statistics	MK4D
MK4D Overall web statistics (visits, page requests, visitors)	MK4D
MK4D top downloads	MK4D
MK4D top pages	MK4D
MK4D top referrers	MK4D
MK4D product statistics	MK4D
Eldis geographical web stats	MK4D
Eldis resource guide web stats	MK4D
MK4D country breakdowns	MK4D
SLI Background Paper	SLI
What's in a name?	SLI
SLI Update	SLI
Thematic Market Research Report: Summary of findings	SLI
Thematic Market Research Report: Access to Information	SLI
Thematic Market Research Report: Disseminating Information	SLI

Thematic Market Research Report: Consuming Information	SLI
Thematic Market Research Report: Searching for Information	SLI
Thematic Market Research Report: Using information to influence policy makers	SLI
Monitoring and Evaluation of IDS Information and Communication Services	SLI
Proving our worth: developing capacity for the monitoring and evaluation of communicating research in development	SLI
A Snapshot of the Information and Communication for Development environment in Malawi	SLI
Libraries & Resource Centres in Tanzania	SLI
Tanzania: A Market Analysis	SLI
Libraries & Resource Centres in Bangladesh	SLI
Bangladesh: A Market Analysis	SLI
Plan for Developing a Research Programme for the IDS Information Department	SLI
Changing Conceptions of Intermediaries in Development Processes: Challenging the Modernist View of Knowledge, Communication and Social Change	SLI
DynamIC Research Project Overview	SLI
Monitoring and evaluation strategy for the department	SLI
In the Know: Thinking about knowledge, information and communication and the IDS Knowledge Services- SLI Conceptual and Programme Framework	SLI
ITAD questions for SLI (reflections post-interview and group discussion)	SLI
A summary of the marketing strategy	SLI
An overview of the capacity development work (part of SLI)	SLI
I-K-Mediary working group description and purpose-draft	SLI
Information Department Partners and Relationships 2007	SLI

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## Annex 8. Terms of Reference



### Terms of Reference for Output to Purpose Review of the Mobilising Knowledge for Development Programme, and Independent Evaluation of Eldis

23 January 2007

The Institute of Development Studies wishes to appoint an experienced evaluation team to carry out an Output to Purpose Review (OPR) of five of the Knowledge Services that it manages, together with a more detailed evaluation of one of these services, ELDIS.

#### 1. Background

The Institute of Development Studies (IDS) is one of the world's leading organisations for research, teaching and communication on international development. It hosts a 'family' of world-class knowledge services which aim to reduce global poverty and injustice by supporting more informed decision-making by those in a position to influence change (see [www.ids.ac.uk/info](http://www.ids.ac.uk/info)). These include:

- **ELDIS** – a gateway to online development information
- **id21** – a research reporting service aimed at policy makers and practitioners worldwide
- **BLDS** – the British Library for Development Studies, a large specialist library on social and economic aspects of development
- **BRIDGE** – a gender and development research and communications service supporting gender advocacy and mainstreaming efforts
- **Livelihoods Connect** – a 'learning platform' focusing on sustainable livelihood approaches to poverty reduction

These services are funded by a range of international donors. Since 2005, support from the UK Department for International Development (DFID) has been brought together under a single contract, called the **Mobilising Knowledge for Development** (MK4D) Programme. The current phase of DFID funding comes to an end in March 2008 and DFID has requested that an Output to Purpose Review (OPR) be conducted for the Programme to help guide its decision-making for the next funding round.

ELDIS is supported by a consortium of donors which, in addition to DFID, includes NORAD (Norway), SDC (Switzerland) and SIDA (Sweden). With ELDIS now 10 years old, its donors have requested that an independent evaluation be carried out.

On behalf of its donors, IDS will be commissioning a single team to carry out both exercises. By linking them together, the intention is to maximise scope for shared learning across the various services.

## **2. Rationale and purpose**

### *2.1 Output to Purpose Review of the MK4D Programme*

The current phase of DFID funding comes to an end in March 2008 and DFID has requested that an Output to Purpose Review (OPR) be conducted of the MK4D Programme to help guide its decision-making for the next funding round.

The review will be based on the over-arching log frame for the Programme as a whole, which includes the range of cross-cutting work being carried out by a new unit, the Strategic Learning Initiative (SLI). Each of the services which make up the MK4D Programme also have their own individual log frames.

The purpose of the OPR is to assess and report on performance to date and to indicate adjustments that may need to be made to ensure the success of the MK4D Programme in the future.

### *2.2 External Evaluation of Eldis*

After 10 years of operation, the consortium of Eldis donors (which includes DFID, NORAD, SDC and SIDA) have requested that an independent evaluation be carried out. A range of user surveys have been carried out by the Eldis team over the years, but this will be the first external evaluation of the service. It is primarily for purposes of accountability and to deliver evidence-based arguments to the stakeholders of ELDIS for their decision-making regarding the service's future funding, organisational structure and development. It will be carried out in accordance to OECD/DAC guidelines, addressing questions of sustainability, relevance, impact, effectiveness, and efficiency as outlined in section 3.2 below.

### *2.3 Learning Goals*

IDS is also keen to use the OPR and external evaluation as an input to its own reflection and learning. They will feed into a strategic review being carried out during 2007, in preparation for planning the next phase of operation for all the services that are part of the MK4D Programme.

## **3. Scope and Tasks**

We expect the team to spend up to 100 days in total on the assignment, with efforts split roughly equally between the OPR and the Eldis evaluation. Fifty per cent of the evaluation effort should go into the evaluation of Eldis (including the Eldis OPR), with the other fifty per cent spread equally across the other knowledge services and MK4D programme as a whole.

### *3.1 Output to Purpose Review*

The Output to Purpose Review will cover the overall logical framework of the MK4D contract. The approach used will be based on DFID's standard procedures for Output to Purpose Reviews, using the Central Research Department's generic terms of reference for mid-term reviews of DFID-contracted research programmes as a guideline, but with some modifications to reflect the nature and objectives of the knowledge services being reviewed.

The logical frameworks of each of the 5 knowledge services (i.e. Eldis, id21, BRIDGE, BLDS and Livelihoods Connect) will need to be analysed to verify individual service performance,

but the OPR should focus on the MK4D Programme as a whole, covering the following areas:

### **Review of Purpose**

- To what degree is the logframe purpose relevant to the overall MK4D goal (of reducing global poverty and injustice as a result of better informed decision-making by development policy makers and practitioners)?
- What is the likelihood of achieving the purpose during the grant period (to be assessed using the standard DFID OPR scoring system, as outlined below)?
- To what extent is the programme/service value for money in terms of delivering its outputs and purpose?

### **Review of Outputs**

- To what extent has the programme/service achieved its outputs, and what is the likelihood of achieving these outputs during the remainder of grant period?

In addition, the OPR should address the following questions for the MK4D programme as a whole:

### **Management and Effectiveness**

- How effective have the management systems been for the MK4D programme as a whole?
- How effective and appropriate have the various services' advisory groups and other stakeholder consultation structures been?
- How effective and appropriate have the service's internal M&E systems been?
- How effective has the MK4D programme been in linking together the various knowledge services, so they complement each other and add up to more than the sum of the parts?
- What lessons have been learned on effective programme/service operation?
- To what degree does DFID's Central Research Department meet the programme's need in terms of management and administration?

### **External factors**

- How effective and useful are the links between the MK4D programme and other related research or research communication initiatives?
- What are the risks associated with the programme, to be assessed using DFID risk assessment processes?

### **Sources of evidence**

The evaluation team will be expected to work primarily from evidence provided through interviews with project staff and will be able to draw on a rich source of data generated by IDS as part of its ongoing internal monitoring and evaluation and learning efforts, such as user surveys, web statistics and qualitative reports. An opportunity will also be provided to interview key CRD and other DFID staff.

**OPR Scoring System:**

Please use the following scoring system:

1 = Likely to be **completely** achieved. The outputs/purposes are well on the way to completion (or are completed)

2 = Likely to be **largely** achieved. There is good progress towards purpose completion and most outputs have been achieved, particularly the most important ones

3 = Likely to be **partly** achieved. Only partial achievement of the purpose is likely and/or achievements of some outputs.

4 = Only likely to be achieved **to a very limited extent**. Purpose unlikely to be achieved but a few outputs likely to be achieved.

5 = **Unlikely** to be achieved. No progress on outputs or purpose.

### 3.2 Evaluation of Eldis

The evaluation will build on the OPR to provide a more in-depth assessment of the sustainability, relevance, impact, effectiveness, and efficiency of Eldis. It will concentrate on the following topics and questions, addressing the OECD/DAC criteria as indicated:

**Topic 1: Delivery of products**

Questions to be addressed:

- To what extent has Eldis delivered the range and quantity of products and services set out in its logframe – see Appendix 2? (*Effectiveness*)
- How effective and efficient are Eldis editorial and production systems in delivering these products and services? (*Effectiveness/Efficiency*)

**Topic 2: Use of Eldis services**

Questions to be addressed:

- To what extent is Eldis achieving the targeted levels and patterns of use set out in its logframe? (*Effectiveness*)

**Topic 3: Relevance of Eldis services**

Questions to be addressed:

- To what extent is Eldis filling a gap in terms of meeting the information needs of target users? (*Relevance*)
- To what extent is the mix of services provided by Eldis an effective response to the varying needs and preferences of different target users (*Effectiveness/Relevance*)

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#### **Topic 4: Effects of Eldis on the ability of development actors to access, exchange and use evidence-based development information**

Questions to be addressed:

- What does the evidence suggest about how Eldis contributes to the ability of development actors (from policy, practitioner and research/teaching communities including the university sector, aid agencies, civil society, government and the media) to access, exchange and use evidence-based development information? (*Impact*)

#### **Topic 5: Future relevance and sustainability of Eldis**

Questions to be addressed:

- How successful has Eldis been in learning from and adapting to changing contexts and user needs? What have been the main drivers for change within Eldis? (*Effectiveness/Sustainability*)
- How relevant will the evolving Eldis service model be over the next five years, given current trends in internet connectivity, information availability and user behaviour, particularly in developing countries? (*Relevance/Sustainability*)
- How appropriate and sustainable is the current funding model for Eldis? (*Sustainability*)

The evaluation team will work primarily from evidence produced by IDS<sup>94</sup>, but will also be expected to produce some new country level evidence to complement this. This will involve conducting interviews with users and stakeholders in three countries in Africa and Asia, provisionally identified as Malawi, Tanzania and Bangladesh.

The selection of individuals to interview within these countries will be made by the evaluation team and should encompass a range of different types of organisations and job roles, within the policy, practitioner and research/teaching communities (including the university sector, aid agencies, civil society, government and the media). Eldis will be able to provide contact details for known users or contributors in each country; the evaluation team will be expected to complement these with contacts of their own. The sample should include both current users, and individuals who are within the Eldis target group but are not current users.

The evaluation team will be able to interview representatives of the four donor agencies, in most cases by email and/or telephone.

## **4. Procedure**

### **4.1 Selection of evaluation team**

The evaluation team should be independent of IDS, and should have the following experience and capabilities:

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<sup>94</sup> Eldis has in place a range of monitoring and evaluation measures, and there a number of cross-cutting M&E activities being undertaken by the Information Department's Strategic Learning Initiative (see Appendix 2). The evaluation team will be able to draw on the outputs of these, some of which will be available at the outset of the evaluation with others becoming available during the course of the summer.



- Demonstrated knowledge of current information management and communication thinking and practice, with a particular reference to international development subjects and audience groups.
- Familiarity with a range of information management and communication tools and approaches (including library management, print publications, and latest web and email technologies and approaches).
- Conceptual understandings of issues to do with knowledge, learning, communication, and social change, especially among development actors.
- Extensive experience conducting evaluations and impact assessments of development programmes of similar size and budget.
- Capacity to produce country based evidence to complement the monitoring data and other evidence generated by IDS
- Familiarity with OECD/DAC evaluation guidelines and DFID Output to Purpose Review methodologies.
- Strong communication skills (written and verbal).
- A mix of backgrounds and experience within the evaluation team, some of whom should be developing country nationals.
- Capacity to provide value for money.

The team will be selected by the donor group from a shortlist of candidates chosen at the Expression of Interest stage. Bidding consortia may be invited to be interviewed as part of the final selection process.

#### *4.2 Determining methodological approaches*

Methodological approaches should be proposed by potential evaluation teams in their proposal. Details will then be developed in consultation with IDS.

#### *4.3 Linkages with IDS monitoring and evaluation efforts and strategic review*

Much of the data to be used for the evaluation will come from the Institute's internal monitoring and evaluation activities. A meeting will be held early on to explain what data will be available (and when), to ensure the external evaluation is complementing and validating, not duplicating, the work being done internally, and to check that the proposed methodological approaches are compatible. Proposals should outline what data they would require (or are assuming exists) for the success of their proposed evaluation approach.

During 2007, the IDS Information Department is carrying out a major strategic review of all its knowledge services, in preparation for planning the next phase of its operations, starting in April 2008. This will include a variety of activities and events designed to facilitate reflection and learning, and encourage engagement with peers and stakeholders. The external evaluation and OPR will be an important input to this process, and the evaluation team will be invited to take part in one or more events in order to share their perspectives and findings.

#### *4.4 Planning and monitoring*

DfID, SIDA, NORAD, and SDC should be considered the main client group for the evaluation. IDS will be managing the contracts, with oversight from the donors group.

#### *1.1.1 4.5 Phases/schedule*

23 Jan 2007	Guidelines for proposals and draft Terms of Reference sent
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	out to short-listed evaluation teams
16 Feb 2007	Full proposals submitted
End Feb 2007	Donors/IDS select evaluation team, prepare contract
Mar 2007	Evaluation team and IDS discuss and agree detailed TOR implementation plan
April 2007	Evaluation work begins, initial meetings with project staff
June-July 2007	Country work undertaken
Mid September 2007	Evaluation team delivers draft report for comment.
Early Oct 2007	Evaluation team delivers final report
Oct-Nov 2007	Evaluation team takes part in learning events

## 5. Reporting

The evaluation team will be expected to produce two separate final reports.

### 5.1 Output to Purpose Review:

This should be no more than 40 pages in length (excluding annexes), and should include:

- A one page summary
- A full list of recommendations for the MK4D programme as a whole, that makes reference to evidence contained within the main body of the report
- A section on lessons emerging
- A DFID 'Project Scoring Summary Report' in accordance with DFID PRISM guidelines
- Recommendations about any revisions required to the overall MK4D logical framework
- A recommendation that the MK4D programme:
  - A) continues as it is
  - B) continues with modification, or
  - C) does not continue

### 5.2 Eldis External Evaluation

This should be no more than 40 pages in length (excluding annexes), and should include:

- A one page summary
- An analysis based on the evaluation findings, broken down under the main topics outlined in this TOR
- A section on lessons emerging from the evaluation
- A list of recommendations

## 6. Guidelines for bidders

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Proposals should be no more than 20 pages in total (excluding c.v.'s) and should include details of the following:

- Proposed methodology and approach, including an outline of what data the team would expect to obtain from IDS and how MK4D stakeholders will be involved in the evaluation
- Details of how the country studies will be conducted
- Division of work between team members
- Management and coordination
- Budget
- A statement summarising relevant experience and outlining the added value offered by the bidding team

**Appendices (to be forwarded to bidders separately, by Friday 26 January)**

1. Mobilising Knowledge for Development Programme logframe
2. Eldis logframe
3. Overview of current Eldis and MK4D M&E Plans

## **Annex 9. Completed DFID OPR form**

Submitted as a separate file.

## Annex 10. Determinants of Knowledge Transfer

Extract from<sup>95</sup>: Lavis et al. (2003). *How Can Research Organizations More Effectively Transfer Research Knowledge to Decision Makers?* The Milbank Quarterly, 81 (2): 221-248.

The authors highlight the determinants that should guide knowledge translation efforts:

1. **Message** (WHAT?) – actionable messages are preferable to single research reports or the results of single studies (*Synthesis*). “Research on managerial and policy decision making has taught us that research in the form of ‘ideas’, not ‘data’, most influences decision-making” (Lavis et al., 2003; 223).
2. **Target Audience** (WHO?) – The types of decisions being made and the types of decision-making environment at hand need to be considered (organisational and political factors cannot be neglected) .
  - When selecting a target audience, one should consider who will be able to act on the basis of the research, who can influence those who act, and with which audience can the most success be expected.
3. **Messenger** (BY WHOM?) – the key here is credibility.
4. **Knowledge transfer process and support system** (HOW?) – passive processes are widely recognised as ineffective, and interactive engagement is preferred. Two-way exchanges can, in the long term, produce beneficial cultural shifts.
5. **Evaluation** (with what EFFECT should it be transferred?) – judgements about the success of an initiative depend on the objective: are we looking for a change in behaviour? An increase in awareness? Introduction of the issue into a debate?  
Measures can capture:
  - A process (e.g. a presentation)
  - An Intermediate outcome (e.g. a change in awareness, knowledge, attitude)
  - An actual outcome (e.g. a decision to select the suggested course of action)

The authors also highlight opportunities for improvement upon current practices, including:

- Developing more and better targeted actionable messages for decision-makers;
- Developing knowledge uptake skills among target audiences;
- Developing knowledge transfer skills within organisations;
- Evaluating the impact of activities (this area is seen as particularly under-explored).

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<sup>95</sup> By Schryer-Roy, 2005