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Reimagining beneficiary metrics: perspectives from Global South practitioners in community development

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Introduction

It is standard practice in most development interventions and organisations to collect and report beneficiary numbers as an indicator of reach and impact. Proponents of beneficiary data often view it as a tool for gathering evidence on the efficacy of global development work. Specifically, motivations include a desire to establish whether money has been well spent, based on the idea that higher numbers reflect greater efficacy and cost-effectiveness. Beneficiary data are also sought as a tool for accountability for funders, who assume that reported beneficiary numbers are an indicator that grantees have used the provided resources to the benefit of targets in the communities. Beneficiary numbers are also used as a means of demonstrating impact.

Beneficiary numbers can be useful to grantees, when collected and used thoughtfully and for appropriate reasons. But that is not always the case, and often the collection of this data is burdensome and time consuming. In this paper, we review the perspectives of different stakeholders around the objectives, methods, and uses of beneficiary data collection. This is contextualised within our organisation Firelight's own journey to continuously adjust our approach and systems to better align with our community partners' needs and our collective values.

It is straightforward to call for the global development sector to "shift power", but far messier to think about what that means in practice, especially when challenging assumptions and practices that have long been standard in the sector, such as the collection of beneficiary numbers. In this paper, we draw upon the perspectives of organisations and practitioners in the Global South, who question and challenge this practice and offer alternatives that may be more aligned with our social change objectives.

Organisational context

Firelight is a multi-donor fund that raises money from foundations, institutions, and individuals to support community-based organisations (CBOs) that are working with their communities to drive systems change for children and youth in eastern and southern Africa. Over the years, we have collected beneficiary data for various reasons. However, over the last few years, we have shifted towards community-driven systems change (CDSC) to empower local leadership and decision-making (Firelight 2021). In this context, CBO grantee-partners have raised concerns about the burdensome nature of data collection and the problematic concept of "beneficiaries", prompting Firelight to reconsider its approach and values.

What is beneficiary data?

Beneficiaries are essentially the people (or in some cases, organisations or other entities) that are considered to have benefited from an intervention or an organisation's work. Beneficiary data are the pieces of information that are captured about each beneficiary – these can be demographic (e.g. gender, age, or role) or intervention-related pieces of information (e.g. reason for inclusion, outcome experienced, etc.).

Literature review regarding beneficiary language and metrics

The definitions of terms, methods, and metrics used to measure the impact and benefits of social transformation programs are primarily driven by funders, as discussed in guidelines and literature relating to non-profit sector management, social impact measurement, and philanthropic evaluation (FCDO 2021; Pole 2022). This has raised questions and concerns from different actors in the sector who are committed to shifting power and community involvement in determining, owning, and driving interventions (Busck-Lumholt, et al. 2024) as well as metrics of success (Turner 2019).

Knight (2021) has described the evolution of 25 years of philanthropy as happening in four phases: the associational revolution in 1989, strategic philanthropy in 2000, systems change for Sustainable Development Goals in 2015, and the #ShiftThePower movement from 2016 onwards. The #ShiftThePower movement emphasises empowering local people and organisations as leaders and thus replacing terms like "beneficiaries" or "recipients" with "agents of change" (Knight 2021).

In the context of community philanthropy, Hodgson and Pond (2018) have argued that by reframing "beneficiaries" as "co-investors", we recognise the assets (money, knowledge, skills, social capital) that community members contribute to their own development process. Community members recognising and owning their own stake in the process is not just more ethical but actually more effective in creating lasting and meaningful change (Hodgson and Pond 2018).

How have we traditionally collected beneficiary data at Firelight?

Firelight's efforts to gather beneficiary data from our grantee-partners have been intended to broadly capture Firelight's reach in terms of people whose lives have been touched by Firelight funding; to support our partners in one form of quantifying their activities and outputs; and to be able to examine over time what kinds of activities our partners are implementing with grant funds, at what cost, and to benefit how many children, youth, families, and community members.

Like many other organisations within the sector that are still practicing conventional approaches, we used to have detailed templates for our CBO grantee-partners to report beneficiary data to serve these objectives. Our templates, accompanied by lengthy explanations, requested numbers of beneficiaries reached through different activities carried out by the CBO, categorised by direct/indirect beneficiary, age range, gender, and role. Not only was this burdensome on CBO grantee-partners, but often the data that came in didn't make sense and had to be checked and validated through back-and-forth with the partner.

Emerging concerns from our own experience with beneficiary data collection

There were various benefits that the above-described reporting system brought to us in terms of understanding, decision-making, learning, and accountability. For example, we were able to aggregate the total number of beneficiaries reached by grantees under a particular initiative, we could calculate how many beneficiaries we have reached in a particular country or under a particular age group based on the information needs of funders or other stakeholders, and we could report numbers of beneficiaries reached in reports to donors and in our annual impact reports. However, our team and CBO grantee-partners grappled with both the burden involved in collecting and validating beneficiary data as well as the larger questions of whether beneficiary data are even useful:

1. Beneficiary numbers are not a great indicator of impact or systemic change.

Just like many others in the sector, we have been grappling with questions of impact, systems change, and sustainability, as well as recognising the limitations of existing metrics in effectively and meaningfully capturing some of these aspects.

There is increasing recognition that far reaching, light-touch interventions may look great in terms of traditional metrics (showing immediate results and high numbers of beneficiaries), but are unlikely to result in lasting, meaningful change – which is what, we believe, will lead to lasting change. We believe that trying to reach a large number of direct beneficiaries during a short funding/project cycle is not more important than creating meaningful long-term change. We recognise that it takes time and investment to develop true shifts in systems that will last and that this change may not be immediately visible. We are also cognisant that beneficiary numbers in a given year are not an indicator of systemic change.

2. The concept of "beneficiaries" implies passivity and overlooks the agency and active engagement of community members.

In our intentional organisational shift to community-driven systems change, we have placed additional focus on recognising the agency of community members – not just treating them as passive "beneficiaries" receiving a service provided by external organisations, but as active collaborators and co-creators of the change process. When community members are actively involved in conceptualising, designing, carrying out, participating in, and evaluating any actions or interventions, the lines between "do-ers" and "receivers" gets blurry. For example, if a youth-led CBO works with other youth in the community to plan and implement youth-led climate mitigation interventions – those youth are doing the work (like staff or volunteers) while also presumably benefiting from the work – but calling them beneficiaries erases their agency, leadership, and deep engagement in conceptualising and carrying out the work.

3. The practice of collecting beneficiary data is usually based on donors' reporting needs, not communities' learning needs.

Generally, the practice has been for funders or INGOs to set grant or partnership conditions or data requirements that involve extracting data from individuals, communities, and countries so that they (the funders or INGOs) can draw their own conclusions from it and showcase their reach and impact. While this may benefit the funder or INGO, oftentimes there is limited value to be drawn from beneficiary numbers for the communities from whom the data were extracted.

In our experience, especially when taking a community-driven systems change approach, when communities are asked what data are actually useful to them, they do sometimes appreciate beneficiary numbers, but they are far more concerned with indicators of true progress and impact – for example, improved quality of the play and learning environment for children, or improved cooperation between community structures, government, and traditional leaders around the issues facing vulnerable families. Our approaches to data and evaluation should be more guided by the learning needs of communities than the reporting needs of funders.

Our inquiry into these questions

To explore these questions further, we examined the concept and practice of capturing beneficiary data, we reviewed literature, and we consulted other stakeholders within the sector through their written opinions and blogs. We also assessed the goals, effectiveness, and future improvements or alternatives. Findings from the reviewed documents informed a stand-alone formal inquiry with a selected group of five CBOs under our initiative, "Community-driven systems change to end child marriage in Malawi", during one of their quarterly meetings. Firelight's learning and evaluation staff facilitated focused discussions with CBO members. Guiding questions invited CBO members, in their organisational groups, to unpack and respond to questions regarding: CBO grantee-partners' and their communities' views on the concept of beneficiaries, challenges in beneficiary data collection, and what evidence-based insights are actually useful for their communities. Furthermore, we consulted informally several other grantees from clusters related to early childhood development in Malawi and Zambia.

Learnings

In the following section, we describe the learnings that have emerged from our inquiry.

Question 1: Are beneficiary numbers useful?

We learned from CBO grantee-partners that beneficiary data can be useful when it is thoughtfully collected and intentionally reflected on in combination with other indicators of progress and success. However, CBO grantee-partners shared some major challenges with the sector when it comes to capturing beneficiary data:

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- There is a lack of clarity around who is a beneficiary based on conflicting definitions and program work that often overlaps the same population in multiple ways. This creates confusion in the gathering of the data and undermines its usefulness.
- Many struggled to collect the data in the first place and found that the collection and collation process was challenging due to environmental and technical difficulties. Tracking beneficiaries requires an investment of grantee-partner time, energy, and resources that could be used elsewhere. Partners also shared that they spent a significant amount of time going through the provided definitions imposed on them to ensure they could justify their numbers, creating a high transaction cost that inhibited their ability to focus on their community work.
- The kind of change we seek to track – long-term, sustainable systems change – is rarely obvious from traditional beneficiary metrics.
- Ultimately, the usefulness of beneficiary data is limited by the accuracy of the data gathered, and whether it paints the full picture of the situation. There is no guarantee that beneficiary data capture a comprehensive picture of the project.

Emerging recommendation for the sector: we should not continue to gather these data in a burdensome manner to grantee-partners.

The current standard practice of asking grantees to report detailed beneficiary numbers is not the best use of local organisations' time and energy. We should go beyond traditional indicators (e.g. beneficiary numbers, service delivery outputs) to more meaningful ones (e.g. the level of trust and relationships, improvement in skills, the feeling of safety), providing both high-level and detailed data to meet different stakeholders' needs, including communities that are at the centre of the interventions.

If it is deemed necessary to collect beneficiary data, we need to strengthen local organisations' data-management systems and support them in distinguishing measurement of who we target, who we actually reach, and the difference it makes. And we should allow for "informed estimates" in data gathering to lessen the burden and simplify the process. "Informed estimates" in social development acknowledge the challenge of obtaining precise quantitative measurements. It emphasises allowing or encouraging "informed estimates" guided by the respective communities' knowledge and expertise. Accepting guidance from local organisations and their communities will promote community-led approaches and recognise the value of qualitative insights alongside quantitative data. While not explicitly defined, community guidance will highlight the importance of meaningful estimations over precise but limited metrics, urging a nuanced understanding of social phenomena in evaluation processes.

What have we tried out differently as Firelight?

In our shift to supporting community-driven systems change, we focus on recognising the agency of community members – not just treating them as passive "beneficiaries" receiving a service provided by external organisations but as active collaborators and co-creators of the change process. We hand power over to CBOs and their communities, and our role is to create space and provide catalytic support for their leadership, confidence, insights, and analyses to guide their interventions and reflections.

As part of this, we support CBOs and their communities to define their own success and signs of success to track progress. CBOs and communities unpack what they see as the pathways to systemic change, and the indicators of progress they wish to track quantitatively or qualitatively along the way. Since they are focused on deeper impact and systemic change, CBOs and their communities often develop indicators reflecting this deeper change, beyond simply counting direct and indirect beneficiaries.

In one initiative that Firelight supports, seven CBOs and their communities are focused on fostering youth resiliency and belonging. Some illustrative milestones and indicators of progress that were prioritised at the mid-point of this initiative are provided in table below, as a case study example.

<table>
<tr><th>Illustrative milestones or indicators of progress and success</th></tr>
<tr><td>Community stakeholders and structures have the knowledge, skills, and tools they need to sustain and improve programs and impact for youth resilience and belonging. For example:
Youth groups have Training of Trainers systems set up so that they can continue and expand their work and impact.</td></tr>
<tr><td>Different types of community members, local leaders/authorities, community structures, government stakeholders, etc. are meaningfully involved in improving environments for youth resilience and belonging. For example:
Community stakeholders and structures are actively involved and co-leading interventions for youth.
Youth are actively involved in co-designing and co-leading interventions to support youth resiliency and belonging.</td></tr>
<tr><td>Community stakeholders and structures have systems in place that continue to respond to youth needs and priorities and continue to support youth empowerment. For example:
Community leaders continue to proactively advocate for youth development supports.
Youth mentorship programs are functional and self-sustaining.</td></tr>
<tr><td>Youth report increased knowledge, skills, and resources that help them be stronger and healthier socially, mentally, physically, and economically. For example, youth may report improved:
employability
vocational skills
capacity to respond to gender-based violence
sexual and reproductive health.</td></tr>
</table>

Youth report increased sense of resilience and belonging, in group activities and in the community more broadly. For example: • Youth have access to safe spaces in their community where they can engage in positive and constructive activities (including recreation and leisure). • Youth report increased sense of belonging following participation in the interventions.
Parents and community members appreciate and integrate youth. For example: • Increased number of parents of youth describing feeling pride and hope for their youth.

While these indicators are more difficult to assess and make sense of than simple beneficiary numbers, they are far more meaningful and actually useful to the local organisations and communities who are trying to assess progress towards longer-term systemic change and deeper impact.

Similarly, in conversations that we and our CBO partners have participated in, hosted by the Movement for Community-Led Development (MCLD), we have been learning about Indigenous African metrics of child and youth well-being. Below we list some examples that we are exploring further with our CBO grantee-partners, as part of the process of communities defining what success looks like as well as how to measure it.

Illustrative Indigenous African indicators of progress and success
Under Early Childhood Development initiatives: • Maasai communities in east Africa track child health through skin texture and energy during play. • Among the Akan in Ghana, storytelling participation and the ability to recite proverbs are seen as indicators of cognitive and moral development.
Under Youth Resilience and Belonging initiatives: • Pastoralist communities in Kenya measure youth resilience by their ability to safeguard livestock during climate shocks. The Himba people of Namibia track youth engagement in cultural storytelling to foster identity and belonging.

Question 2: What language should we use?

The term “beneficiaries” presents challenges. It suggests that individuals who are the project target have limited involvement and are passive, providing no input. It is paternalistic, suggesting that they sit back and listen to the “experts” and implementers of the project on what is good for them to address the social issues they live with. As a result of these connotations, some CBO grantee-partners generally do not like the term “beneficiaries”, although there is no consensus on a suitable alternative. Another concern that CBO grantee-partners reported is that there are often poor translations of “beneficiary” into local languages, which can have unintended effects.

Why does language choice matter?

As outlined above, the language we used has deep implications not only in the narrative of our work but also in its implementation and efficacy. We learned from various practitioners, evaluators, stakeholders, and our CBO grantee-partners that "beneficiary" suggests the receipt of benefits. One survey of about 500 international development practitioners highlighted "beneficiaries" as one of the top two words they would most like to ban (Green 2018). Indeed, moving away from using the term "beneficiary" has been described as an easy and immediate way to make meaningful progress in the movement to #ShiftThePower (Maddox 2020).

What alternatives could we use?

There are many terms that were suggested by different actors within the sector to replace "beneficiaries". These included "people", "target population", "people reached", "target group", "recipients", "participants", "clients", "affected population", "boundary partners", "partners", "rights holders", "people at risk", "vulnerable people", "change agents", "citizens", "clients", "stakeholders", "primary stakeholders", "communities", "users/users of services", "consumers", "members of civil society", "rights holders", "changemakers", "leaders", and "constituents" (Chaplowe 2016; Maddox 2020). Of these options, "people reached", "constituents", "participants", and "stakeholders" seem to be at the top of the list.

- "People reached" is a term that includes an intersection of two sub-sets: the target population and unintended people reached. However, semantics aside, we should not underestimate the challenges encountered when measuring service outreach or people reached – especially with larger organisations/operations in complex settings (Chaplowe 2016).
- "Participants" is a term that is mainly used by proponents of participatory approaches, whereby communities targeted work hand in hand with implementers of the initiative from the organisations that have received donor funds. However, it still tends to demarcate between those who create and deliver the program and those who receive and participate in the program (Chaplowe 2016).
- "Stakeholders" seems to be another term that works for smaller, localised organisations that provide direct services to their communities. However, "stakeholders" has also been found to be problematic because, historically, a stakeholder was the person who drove a stake into the land to demarcate the land s/he was occupying/stealing from Indigenous territories (Reed 2022).
- "Constituent" could be someone who authorises another to act as an agent. However, when exploring the potential use of this term among our team, colleagues raised concerns that in many countries, the term "constituents" has a strong association with politics, which might make a funder or civil society organisation's use of it confusing and potentially misleading.

It is clear that no single term will be universally perfect, and as a sector, we probably cannot identify a single appropriate word to replace "beneficiaries". Due to the diverse needs of organisations and the diverse ways in which we work, how we refer to the people we partner with and/or serve will need to vary. However, our recommendation is that in our own organisations and in our partnerships and collaborations, we are intentional about these questions and the choices of the words we use, based on our values and ways of working.

Conclusion

This paper summarises the problems inherent in both the concept and practice of traditional beneficiary data metrics. It points out that while beneficiary numbers are often used to demonstrate impact and accountability to funders, these data do not reflect meaningful, long-term, systematic, and sustainable change. The process of capturing beneficiary numbers can be challenging, time consuming, and costly for our local organisations, often detracting from their core function.

The term “beneficiaries” has also been critiqued for implying passivity and overlooking community members in driving sustainable change. Language used in this sector should better reflect the participation and agency of community members. Forging ahead, we recommend stopping use of the term, as we continue to try out and explore alternative terminologies that recognise the contributions and agency of these individuals, such as “primary stakeholders”, “changemakers”, or “constituents”, while acknowledging that no single term may be perfect for all contexts. The take-away is that we need to be intentional with language and practices that align with our values and objectives and continue to engage in learning and adaptation.

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