

How can we better evaluate **Farm Business Advisors**, track their progress, and **support them in their growth as entrepreneurs?**



Evaluating and Tiering Farm Business Advisors: Evidence from the REFINE initiative

BACKGROUND iDE Zambia's Farm Business Advisor (FBA) Program seeks to improve rural livelihoods through a corps of FBA entrepreneurs who connect geographically isolated farmers with inputs, markets, credit, services, and advice. iDE links FBAs with business partners and trains FBAs on sales techniques, irrigation technology, crop management, and output marketing. The Research and Evaluation Funds to Improve Non-subsidized Extension (REFINE) initiative supports the FBA program via operational research exercises designed to optimize components of the FBA model.

Building off of the work carried out in previous REFINE projects, the REFINE team determined that the FBA program would benefit significantly from a formalized and efficient evaluation process to grade FBA performance and assign them into tiers. Such a process would help target support provided to FBAs and clarify the progression FBAs can aspire to attain, while also streamlining many aspects of FBA performance management.

iDE management posed the question:

How can we better evaluate Farm Business Advisors, track their progress, and support them in their growth as entrepreneurs.

Project

In February 2016, the REFINE Working Group agreed to develop a tiering process for FBAs as the fourth project in the REFINE Initiative. The goals of the process are as follows:

- To improve monitoring of FBA progress
- To provide structure for FBA progression through the program
- To help maximize the impact for each FBA of iDE time and resources

The FBA tiering process was developed through an iterative process based on interviewing and soliciting feedback from Field Officers, surveying FBAs, and meeting regularly with the REFINE Working Group. The REFINE team traveled to three provinces and

nine districts to conduct interviews and collect information on the metrics and attributes iDE staff found to be most beneficial in evaluating FBAs.

Tiering Overview

The FBA tiering system has four main tiers: Inactive/dropout², Tier C, Tier B, and Tier A. FBAs progress from entry-level status (typically Tier C) through the tiers, ultimately graduating from the program following attainment of Tier A status. FBA graduates should be able to excel in all pillars of FBA activity without iDE support, manage a successful agroshop, successfully secure financing from financial institutions, and provide a range of knowledge and services to farmer clients.

On a monthly basis, FBA data will be analyzed automatically through the Salesforce-based management information system (MIS). The data will be used to identify ("flag") FBAs for further review when an FBA is on the cusp of progressing to a new tier. Flagged FBAs will be evaluated in greater depth by iDE Field Officers based on qualitative and quantitative factors related to their business skills, attributes, assets and achievements. After the evaluation, the Field Officer and the flagged FBA will work together to create a plan for progression and performance goals to be met during the following 3-month period.

FBA Tiering Structure



Tiering of FBAs involves three steps:

1. KEY METRIC SCORING

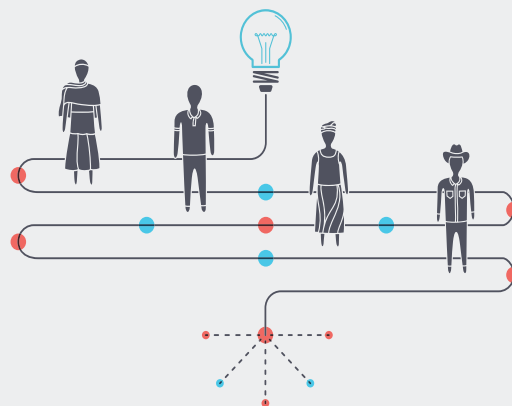
Completed by iDE HQ/Management

The following metrics have been identified as key indicators of FBA success:

Monthly Profit: amount earned per month from FBA activities, after accounting for costs

Monthly Clients: number of customers that the FBA transacts with during a month

Every month, the iDE Zambia Salesforce MIS will automatically flag FBAs, based on the FBA productivity data collected during the routine FBA Update data-collection process. If the data indicate that an FBA is performing higher or lower in both of these metrics than their current tier, they will be flagged for an in-depth evaluation comprised of the **Qualitative Business Skills Ranking** and the **Attributes, Assets and Achievements Scoring**.



2. QUALITATIVE BUSINESS SKILLS RANKING

Completed by Field Officers

FBAs are expected to exhibit certain qualities that are linked to business success. During the evaluation, Field Officers will score FBAs on their skills in communication, reliability, organization, leadership, and trustworthiness according to a standardized rubric.

See handbook information on back page for more detailed information on scoring each characteristic.

3. ATTRIBUTES, ASSETS, AND ACHIEVEMENTS SCORING


Completed by Field Officers


Expectations for FBA performance regarding certain attributes, assets, and achievements was provided in a **tiering reference guide**. These categories cover business requirements associated with entrepreneurial success such as possession of formal bank accounts, strong saving activity, household assets, and accomplishments within iDE pillars. Specific benchmarks for each tier were listed in the rubric, however, this component of the evaluation allows for more subjective Field Officer discretion than the other two sections.


Tiered iDE Support Certain components of the FBA model are more difficult than others for FBAs to practically implement. In general, success in the more complicated activities requires FBAs to have greater startup capital available, more business experience, and stronger influence and reputation in the community. Therefore, iDE support for these activities is likely to be more beneficial if FBAs have first built up experience in the other pillars.

While FBAs will be trained in the basic activities of all four pillars at the beginning of their time as FBAs, more intensive iDE support should focus on the skills and activities likely to be most helpful for each FBA at their current level of experience and capability.

Reference materials available upon request

 Read More: **FBA Tiering Handbook.** A detailed handbook to be used by iDE Zambia field staff to carry out the FBA tiering process.

 Read More: **FBA Tiering Overview.**
A document explaining the tiering structure in greater detail.

 Read More: **FBA Tiering System Structure.**
An excel spreadsheet that contains a detailed rubric for each FBA tier and the support that the FBAs should be provided by iDE at each level.

iDE

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