



Voluntary Organizations for Professional Evaluation (VOPEs)

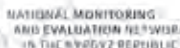
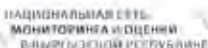
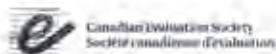
Learning from Africa, Americas, Asia, Australasia, Europe and Middle East

In partnership with:



UNEG
United Nations Evaluation Group





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- ISSUE #1: New trends in development evaluation. Published jointly with IPEN. 2006.
- ISSUE #2: Bridging the gap: The role of monitoring and evaluation in evidence-based policy making. Published by UNICEF in partnership with the World Bank, IDEAS, DevInfo, and MICS, 2008.
- ISSUE #3: Country-led monitoring and evaluation systems. Better evidence, better policies, better development results. Published by UNICEF in partnership with the World Bank, IDEAS, IOCE, UNECE, DevInfo, and MICS, 2009.
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This is the second volume of a proposed series of publications on Evaluation and Civil Society. It should be read together with the first volume on "Evaluation and Civil Society: Stakeholders' perspectives on National Evaluation Capacity Development." For additional information about Voluntary Organizations for Professional Evaluation (VOPE) case studies, please visit the mapping webpage at: <http://mymande.org/evalpartners/international-mapping-of-evaluation>

Voluntary Organizations for Professional Evaluation (VOPEs)

Learning from Africa, Americas, Asia,
Australasia, Europe and Middle East

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A QUICK GLANCE AT THIS BOOK'S KEY MESSAGES

- During the past few decades there has been a remarkable growth in the evaluation profession as evidenced by the number of Voluntary Organizations for Professional Evaluation (VOPEs) that have formed. The number of national and regional VOPEs has risen from 15 in the 1990s to more than 155 by early 2013. The aggregate total of their memberships now surpasses 34,000.
- Many of the national VOPEs began as loose, informal networks of individuals who discovered a common interest in learning about evaluation methodologies. Some subsequently evolved into more formal associations or societies, with constitutions and bylaws, and even official governmental recognition. The typical focus in this second phase is on institutional development and strengthening of the VOPE itself.
- Some VOPEs have further evolved, recognizing the need not only to improve the *supply* of quality, credible, useful evaluations, but also to address the *demand* side – including advocating for governmental policies and systems that call for appropriate forms of evaluation that contribute to accountability, learning and public transparency.
- The focus of this book is on a set of case studies written by leaders of selected VOPEs. These are 'positive deviants' – organizations that have especially relevant and useful experiences to share that could be helpful to other VOPEs as they seek ways to increase their capacities to strengthen not only the supply of evaluations but also influence the enabling environment for evaluation in their countries.

- There are four sets of case studies included in this book. They include:
 - Academic institutions that are offering courses in professional evaluation (the example of TESA – Teaching Evaluation in South Asia)
 - Regional VOPEs (AfrEA, AES, CoE, EES, IPEN, ReLAC)
 - 15 national VOPEs
 - The experiences of 4 VOPEs with specific focus on gender-responsive evaluation.
- In their preface, IOCE President and Vice President, Natalia Kosheleva and Murray Saunders, write about the role of the professional community of evaluators (VOPEs) to promote the growth of individual, institutional and national evaluation capacities.
- In their “keynote” introductory chapter, Natalia Kosheleva and Marco Segone, Co-Chairs of the EvalPartners Initiative, provide a useful background to the formation and purpose of VOPEs. They also describe the role of the EvalPartners global collaborative partnership in enhancing the capacities of VOPEs in multiple ways.
- In his article on the growth and evaluation capacities of VOPEs, Jim Rugh summarizes some of the findings of the mapping survey conducted during 2012.
- As a sequel to the first book on the role of Civil Society in the development of national evaluation capacities*, this book is one of the ways EvalPartners is contributing to the strengthening of VOPEs and they roles are playing in

* Evaluation and Civil Society: Stakeholders’ perspectives on National Evaluation Capacity Development. Published by UNICEF, EvalPartners and IOCE in partnership with CLEAR, IEG World Bank, Ministry for Foreign Affairs of Finland, OECD Development Assistance Committee Network on Development Evaluation, UNEG and UNWomen, 2013.

this vital movement towards development that benefits all members of society, especially those who too often get left behind.

- For further information about EvalPartners, including other books in this series, you are invited to check out the website at <http://www.mymande.org/evalpartners>
- For more information about IOCE, and to see the map and list of VOPEs around the world, and links to more information about them, check out www.IOCE.net
- We hope you might be stimulated by the reading of this book, especially the case studies, to join in follow-up discussions. You are invited to join the EvalPartners group on LinkedIn, or join the IOCE-Network listserv by sending a message to IOCE-Network-subscribe@yahoogroups.com

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Preface

Natalia Kosheleva, President IOCE;

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PREFACE

We have a dream, a dream of a world where all human beings – regardless of their sex, race, level of education, or any other attribute that we use to differentiate between and discriminate against each other – believe that they have the duty to take care of themselves, their families, communities, countries and the planet. This is based on the vision that every human being should have a right and an obligation to exercise their duty to bring these things about.

This book offers strong evidence of the way evaluation can contribute to making this possible. Around the globe, there are evaluation professionals who work together to take the responsibility for the development of their profession and for the development of their countries. Voluntary professional organizations of evaluation practitioners are unique “creatures”. Their members may compete with each other for jobs and contracts, but still they are able to join forces to advance the interests of the profession that contributes to social betterment by helping to improve public policies and programs.

This book also offers a number of important lessons. One is in the power of a professional community in which there is a free exchange of ideas and experiences and the way it promotes the growth of individual, institutional and even national evaluation capacities. Another is that even the most experienced members of this professional community, as individuals or organizations, can learn from younger and less experienced colleagues, and that even the most humble members of this community have some valuable experience to offer. In this way, both novices and so called experts alike are able to contribute knowledge resources from their experience to enhance practice and improve the connection between evaluators and policy makers and between evaluations and policies.

We are sure that members and leaders of Voluntary Organizations for Professional Evaluation (VOPEs) will find many inspiring ideas in this book. And we encourage them to take the next step and reach out to colleagues in other countries

to learn more about each other, exchange ideas and form partnerships to advance the profession of evaluation around the world.

Natalia Kosheleva,
President
IOCE

Murray Saunders,
Vice President
IOCE

EDITORIAL

This book is a sequel to its predecessor, *Evaluation and Civil Society: Stakeholders' perspectives on National Evaluation Capacity Development*. In that first book, leaders of major international agencies eloquently described their perspectives on the strategic role Civil Society Organizations can and should play in promoting use of evaluation by governments and others to be more transparent and accountable, and to use the findings of evaluations to continuously improve the effectiveness of policies and programs.

In this book the focus is on the experiences of many Civil Society Organizations – more specifically, Voluntary Organizations for Professional Evaluation (VOPEs). These are formally organized societies or associations, or, in some cases, informal networks; some at regional levels, many at national levels. Their members come from a variety of perspectives, including government, academia, NGOs, consultancies, etc.; yet with common interests in promoting the production and utilization of evaluation.

In the Preface, Natalia Kosheleva and Murray Saunders provide an eloquent introduction to the roles of VOPEs. Natalia Kosheleva and Marco Segone provide a fuller description of the roles of VOPEs in the lead article in the next session. As described in the article on the Growth and Evolving Capacities of VOPEs, the recent mapping exercise undertaken by EvalPartners revealed the amazing growth not only in the numbers of VOPEs around the world, but also the increasing influence many of them are having on the enabling environment for evaluation.

Of course improvements in the quality, credibility and utility of evaluations requires appropriate and adequate education of evaluators. The final article of Part 1 is a description of a major initiative to introduce evaluation curricula in universities in South Asia. We thank the leaders of TESA for sharing their case study.

We also express our appreciation for the many voluntary leaders of regional and national VOPEs who took the time

and effort to write case studies describing the experiences of their organizations. They include descriptions of what they are doing to enhance capacities of members to conduct evaluations, strengthen their VOPEs' own institutional capacities, and a special focus on the strategies and lessons they are learning with regard to addressing the enabling environment for evaluation. Photos and brief bios of these authors are included near the end of this book.

A special word of recognition and appreciation is expressed to Inga Sniukaite for taking the initiative to solicit the production of a number of special case studies focused on what some leading VOPEs are doing to promote equity-focused and gender-responsive evaluations. Those case studies are included in Part 4 of this book.

There is much valuable content in this collection of case studies. We highly commend them to your reading. They give a very insightful and instructive perspective on the significant roles these Civil Society Organizations – more specifically, VOPEs – are playing in strengthening capacities of evaluators and the enabling environments that promote evaluation.

Jim Rugh,
EvalPartners Coordinator

Marco Segone,
EvalPartners Co-Chair



Part 1

EvalPartners and the roles of Voluntary Organizations for Professional Evaluation (VOPEs)

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EVALPARTNERS AND THE ROLE OF VOLUNTARY ORGANIZATIONS FOR PROFESSIONAL EVALUATION IN THE DEVELOPMENT OF NATIONAL EVALUATION CAPACITY

Natalia Kosheleva

EvalPartners co-chair and IOCE President

Marco Segone

EvalPartners co-chair and UNICEF

As professions develop, they tend to self-organize and become increasingly altruistic in motivation, wrote American educator Abraham Flexner in his seminal essay “Is Social Work a Profession?” that set forth the criteria for defining a profession. Under democratic conditions “professional groups have more and more tended to view themselves as organs contrived for the achievement of social ends rather than as bodies formed to stand together for the assertion of the rights or the protection of interests and principles” (Flexner, 1915).

VOPEs’ contributions to national evaluation capacity development

The history of the development of Voluntary Organizations for Professional Evaluation (VOPEs) demonstrates that the profession of evaluation follows the path mapped by Flexner. VOPEs are established by evaluation practitioners, that is, people who make their living by doing or commissioning evaluations, who self-organize to discuss and share professional experiences and challenges and to jointly advance the profession and develop professional standards. VOPE events, e.g. conferences, workshops and seminars, and publications provide a platform for professional exchange. This exchange advances the professional capacity of more experienced evaluators and the learning of those who are new to the profession. Initially VOPEs contribute to the development of national evaluation capacities by building capacities of individual evaluators. At this stage VOPEs may also indirectly influence national and organi-

zational evaluation policies if VOPE members get involved in the development of these policies as individuals. Eventually VOPEs may get more directly involved in the development of national and subnational evaluation policies and thus start to contribute not only to the benefits of VOPE members but to the benefits of the society at large as well. Case studies presented in this book provide vivid illustrations of how these processes manifest themselves in different national contexts.

Development of national VOPEs started in the late 1970s and early 1980s – with the establishment of the Evaluation Research Society in the USA in 1978¹ and the Canadian Evaluation Society in 1981. In the early 2000s the evaluation professionals felt the need for global integration and global platforms for professional exchange. This led to the establishment of the International Development Evaluation Association (IDEAS), an individual membership organization, in 2002, and the International Organization for Cooperation in Evaluation (IOCE), a global association of regional and national VOPEs, in 2003.

EvalPartners Initiative

The launch of the EvalPartners Initiative in January 2012 marked the new stage in the global integration of the VOPE community and the readiness of this community to contribute to the social change. EvalPartners was created under the auspices of UNICEF and the IOCE with initial funding from the Government of Finland.

EvalPartners is an innovative partnership that seeks to enhance the capacities of VOPEs to influence policy makers, public opinion and other key stakeholders so that public policies are based on evidence, and incorporate considerations of equity and effectiveness. The objective of the Initiative is to enhance the capacities of VOPEs to engage in a strategic and meaningful manner in national evaluation processes, contributing to improved country-led evaluation systems and policies that are equity-focused and gender equality responsive.

In December 2012 EvalPartners convened the International Forum on Civil Society's Evaluation capacities in Chiang Mai, Thailand. The Forum facilitated the sharing of good practice and lessons learned by VOPEs and other stakeholders engaged in Evaluation Capacity

1 In 1986 the Evaluation Research Society merged with Evaluation Network and Maryland Evaluation Association to establish the American Evaluation Association.

Development (ECD). The Forum also identified EvalPartners' *priorities* and *implementation mechanisms*:

- Facilitation of peer-to-peer collaborations among VOPEs;
- Development of a toolkit on VOPE institutional capacity;
- Generation of new knowledge on VOPE operation;
- Development and implementation of advocacy strategies to enhance the enabling environment for evaluation;
- Promotion of equity-focused and gender-responsive evaluation.

Participants signed the EvalPartners Chiang Mai Declaration committing themselves to EvalPartners' objectives and principles. These principles include:

- Equity and social justice as central values;
- Recognizing that the country-led evaluation systems and functions are vital to ensure that development interventions implemented by international donors and governments themselves are effective, efficient and responsive, achieve desirable development outcomes and improve the quality of life of all;
- Recognizing that civil society organizations in general, and VOPEs in particular, must play a key role in influencing and enhancing the demand for evaluation and the use of evaluation results; in developing the capacity of national and local authorities, as well as communities, NGOs, academia and the private sector, to endorse and support evaluations of their own policies and programmes.

EvalPartners Peer-to-Peer Support Program

The key mechanism to advance EvalPartners' objectives is the Peer-to-Peer (P2P) support program. The P2P program offers an innovative approach to strengthening individual VOPEs' capabilities by taking advantage of and maximizing capacities and experiences within the global community of VOPEs. The program encourages two or more VOPEs to form partnerships with each other in order to help each other to strengthen their capacities to achieve any of the four results below:

- VOPEs have strengthened institutional capacities;
- VOPEs are able to play strategic roles to strengthen enabling environments for evaluation within their countries, contributing to improved national evaluation systems and policies;

- VOPE members have strengthened evaluation capacities;
- VOPEs have adopted principles of equity-focused and gender-responsive evaluation and have strengthened capacity to promote them to individual members and to those who commission evaluation.

The core operational mechanism of the P2P program is the Small Grant Facility (SGF). SGF operation is based on the principle of common responsibility: VOPEs who seek to benefit from SGF funding also take a responsibility for operation of the SGF by participating in the review of project proposals.

The P2P program will build VOPEs' awareness of the experiences of other VOPEs, stimulate communication between VOPEs both within and across regions and enhance VOPEs' capacities to contribute to national evaluation capacity on two levels: the level of individual practitioners and the level of national and subnational evaluation policies.

Raising Global Profile of VOPEs

EvalPartners also seeks to strengthen the enabling environment for VOPEs by promoting evaluation on the global level. EvalPartners will engage with international organizations and networks to promote understanding that evaluation can provide sound evidence to inform public policies and thus increase their effectiveness and efficiency and that VOPEs are especially well-positioned to support the development of evaluation systems at national and local levels. To raise the global profile of evaluation and VOPEs, the year 2015 will be declared the International Year of Evaluation.

Conclusion

EvalPartners is the first global initiative with the aim of promoting coordinated efforts among development funders, governments and civil society, in order to strengthen evaluation capacity of civil society so that it can play a more effective role in promoting evidence-based policy-making.

In line with the Millennium Declaration, multi-lateral and bilateral development partners have been active in promoting programmes that foster human rights and equity, and that are gender-responsive. There is recognition of the role that civil society can play in enabling progress in social justice and equity promotion efforts.

In this way, EvalPartners represents widespread consensus on the importance of evaluation as one effective tool in supporting development programmes to achieve equitable and gender-responsive results.

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THE GROWTH AND EVOLVING CAPACITIES OF VOPEs

Jim Rugh

EvalPartners Coordinator

I. The Amazing Growth in VOPEs Around the World: Brief Summary of the EvalPartners Mapping Survey

One of the initial activities of the EvalPartners Initiative was a mapping survey to update the database of Voluntary Organizations for Professional Evaluation (VOPEs) maintained by IOCE, not only to do a fresh count of national VOPEs, but to learn much more in depth about them.

There were three phases to this exercise. The first was to update contact information for all the VOPEs already on the IOCE database, and continue the search for others. The second phase of the mapping exercise was to send out a survey soliciting basic information about each VOPE. We previously had basic profile information on only 54 VOPEs. As noted in Figure 4 below, a total of 97 VOPEs eventually responded to the EvalPartners survey, providing expanded information about their purposes, memberships, organizational capacities, etc. Based on those responses, as the third phase of this mapping exercise, the VOPEs that appeared to have more experience in advocating for enhanced evaluation policies and systems on the part of national governments were invited to provide more in-depth descriptions of their experiences in the form of case studies. Such case studies were received from 38 national and regional VOPEs. All of the survey responses and case studies have been uploaded to the www.ioce.net website, more specifically at www.ioce.net/members/national_organizations.php.

Based on the relevance of their experiences in addressing the enabling environment for evaluation (basically ‘positive deviants’ with lessons learned of interest to other VOPEs), 25 of the case studies were selected for inclusion in this book.

Here we present some of the numbers generated by the mapping survey, to give a perspective on the growing numbers of VOPEs, and thus an indication of the growth of the evaluation profession.

Of the currently existing evaluation societies or associations, the first to be formed was the Canadian Evaluation Society (CES) in 1981. Though the American Evaluation Association (AEA) was not formed until 1986, it was actually a merger of three existing associations, one of which was formed in 1978 (so it could claim to be older than CES!). Nevertheless, the table below gives the 'birth' years of some of the VOPEs, highlighting the Big and Regional VOPEs. It is extracted from a longer list that includes the formation years reported by 103 VOPEs.¹ The rate of the cumulative growth in numbers of VOPEs is dramatically illustrated in the bar graph of Figure 2.

Figure 1. Years VOPEs were formed, emphasizing big and regional VOPEs

<i>Year founded</i>	<i>Country</i>	<i>Acronym</i>	<i>Cumulative total</i>
1981	Canada	CES	1
1986	USA	AEA	2
1987	Australasia	AES	3
1988	Canada/Quebec	SQEP	4
1994	Europe Regional	EES	7
1995	Malaysia	MES	8
1996	Peru	Red EvalPerú	9
1997	Germany + Austria	DeGEval	11
1999	Africa Regional	AfrEA	19
2000	Russia & CIS Regional	IPEN	24
2001	Zambia	ZEA	25
2002	Netherlands	Vide	29
2003	Senegal	SenEval	33

¹ Note: Though, as of mid-March, 2013, 100 national and 12 regional VOPEs had been verified (via survey responses or currently up-to-date websites), dates of formation were only reported by 103 VOPEs.

<i>Year founded</i>	<i>Country</i>	<i>Acronym</i>	<i>Cumulative total</i>
2004	Latin America & Caribbean Regional	ReLAC	37
2005	Honduras	REDHPRESS	47
2006	Nicaragua	ReNIcSE	55
2007	Kyrgyz Republic	Kyrgyz M&E Network	60
2008	Europe Regional	NESE	70
2009	Brazil	BMEN	79
2010	Kenya	EKS	87
2011	MENA Regional	EvalMENA	95
2012	Turkey	TEA	102
2013	Palestine	PEA	103

Figure 2. Cumulative number of VOPEs in existence, by year

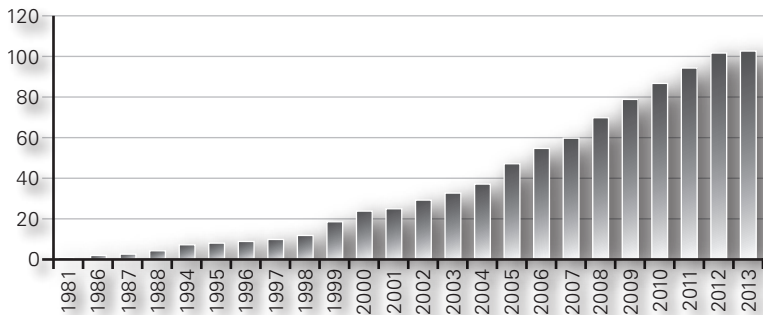


Figure 3. EvalPartners VOPE survey by the numbers²

Countries in which we have some VOPE contact information	117
Number of national VOPEs identified	148
Number of national VOPEs <i>verified</i> (via survey responses or active websites)	100
Number of countries with one or more <i>verified</i> VOPEs	89
Regional VOPEs	12
International VOPEs	11

Figure 4. Survey responses and case studies received

National / regional VOPEs to which survey questionnaire was sent	145
Survey replies received	97
Case studies received	38
Case studies selected for inclusion in this book	25

Figure 5. Membership numbers of largest VOPEs

<i>Name of VOPE</i>	<i>Acronym</i>	<i>Membership</i>
American Evaluation Association	AEA	7,755
Red de Seguimiento, Evaluación y Sistematización en America Latina y el Caribe	ReLAC	3,847
Rede Brasileira de Monitoramento e Avaliação (Brazilian M&E Network)	BMEN	3,660
Red de Monitoreo y Evaluacion de America Latina y Caribe	RedLacMe	2,557
Canadian Evaluation Society / Societe canadienne d'évaluation	CES / SCE	2,016
Australasian Evaluation Society	AES	1,034
Gesellschaft für Evaluation e.V.	DeGEval	722
Société Française de l'Évaluation	SFE	600
International Program Evaluation Network (CIS)	IPEN	556

² As of March 2013.

<i>Name of VOPE</i>	<i>Acronym</i>	<i>Membership</i>
Indonesian Development Evaluation Community	InDEC	554
Sociedad Española de Evaluación (Spain)	SEE	550
Associação Brasileira de Avaliação Educacional (Brazilian Association of Educational Evaluation)	ABAVE	500
Society for Monitoring and Evaluation, Nigeria	SMEAN	452
European Evaluation Society	EES	411

While recognizing the fact that many evaluators are members of more than one VOPE, i.e. that there is considerable (but unknown) overlap between the membership numbers reported by VOPEs,³ it is interesting to note that the total aggregate membership numbers add up to over 34,000. That is a rough indicator of the size of the evaluation profession, or at least the growing number of people who have interest in and responsibilities related to evaluation, as suppliers or commissioners or academics or for whatever other reason.

Based on the survey responses, 36% of these VOPEs are informal networks, 15% say that they have adopted a charter and bylaws but are not yet officially recognized, and 49% report that they are legally recognized by their governments (presumably after adopting a charter and bylaws).

One of the main interests for conducting the EvalPartners survey, in addition to simply updating basic profile information, was to ascertain how engaged these VOPEs already are in terms of addressing the enabling environment for evaluation, i.e. by advocating for enhanced evaluation-related policies and systems on the part of their governments. Figure 6 indicates that there is a wide range of involvement in policy advocacy, based on a scoring of what they wrote in their survey responses.

3 AEA, for example, reports that 15% of its membership (over 1,000 people) are “international”, i.e. citizens of other countries, therefore presumably also members of their national VOPEs in addition to being members of AEA (and perhaps other big and/or regional VOPEs as well.)

Figure 6. Involvement in policy advocacy on the part of VOPEs

Policy advocacy score = 10 (out of 10, i.e. very actively engaged)	19	29%
Policy advocacy score between 5-9 (quite actively engaged)	14	21%
Policy advocacy score between 1-4 (very little engagement)	14	21%
Policy advocacy score = 0 (not involved at all)	19	29%
Total number of survey responses scored	66	100%

We will now turn from the quantitative growth of the evaluation profession as evidenced by the growing numbers of VOPEs, to some perspectives on what many VOPEs are achieving in addressing the enabling environment for evaluation, including advocating for national monitoring and evaluation policies and systems.

II. Promising Practices on VOPEs' Roles in National Evaluation Capacity Development

Perhaps a typical scenario in the early formation of networks of evaluators is that a few individuals overcome their competitive nature, and decide to get together informally to share experiences in methods applied to evaluation. Though these may begin as informal discussions, they then might organize workshops, led by some of their own members and inviting outside experts, to share theories and experiences from other countries. As and when such informal networks decide to become more formally organized they go through the process of creating a constitution and bylaws and getting officially registered in their country.

Thus the first phase of the development of what we now call VOPEs is typically focused on skills development, and the second phase on strengthening the VOPE's own institutional capacity.

As is evident from the case studies received, a growing number of VOPEs are going beyond addressing the 'supply side' (capacities of members to conduct evaluation) to addressing the 'demand side' – i.e. the environment that influences requests for evaluation, including the Terms of Reference shaping what clients are asking evaluators to do. More than that, especially in countries where most evaluations have been done to respond to the demands by

external donors funding development projects, these VOPEs are beginning to realize the need for national governments to see the value of evaluation for their own purposes. As we will see, there are many remarkable examples of VOPEs having significant influence on governments as high-level evaluation-related policies are formulated and as national, ministerial and provincial M&E systems are established and implemented.

We will highlight some of these examples in the next section. These are just “appetizers” – to give you, the reader, an introduction to the varied experiences of these VOPEs, and hopefully to encourage you to read the full case studies in the rest of this book. Indeed, there is much rich data therein; other evaluators and students of evaluation are encouraged to ‘mine the data’ in these case studies to develop syntheses using a variety of perspectives, on how VOPEs are advocating vis-à-vis governmental policies, or other aspects of what VOPEs are learning about multiple dimensions of promoting evaluation capacity development (ECD).

III. Extracts from National VOPE case studies

Australasian Evaluation Society (AES)

The role of AES members who have worked in the public sector has been important in strengthening the enabling environment. There have been prominent AES members who promoted evaluation practice within the Department of Finance, the Office of the Premier and Cabinet in Western Australia and the Department of Human Services in Victoria. Integrating evaluation processes and procedures within government has promoted the value of evaluation in improving program quality and increased the program standards for government and not-for-profit service providers.

The AES conference where evaluation policy issues and opportunities are presented and discussed is well-attended by government representatives, and this provides a forum for networking between the government attendees and other evaluation practitioners. In New Zealand, there has been a particular focus on good evaluation practice in relation to cross-cultural issues and this is strengthening the application of such practice in a range of public programs.

In recent years, the AES has increasingly turned its focus towards policy advocacy. One example is the AES’s recent submission to

the Australian Government Department of Finance and Deregulation's draft Commonwealth Financial Accountability Review (CFAR) 2010. The objective of CFAR is to improve performance, accountability and risk management across government. The AES submission highlighted the work of the AES and its role in strengthening accountability for public investments. The AES' Strategic Engagement Committee will work to further advance evaluation in the external environment in both domestic and international development spheres.

Innovations and lessons learned

The AES has continuously built on lessons learned from its own operation and membership, as well as by maintaining relevance in the global context of evaluation practice. The AES has evolved through a series of phases: from the excitement of establishment, through the challenges of building a regional body; from being an informal interest group to a professional business-driven organization – each phase building from the previous phase. Nevertheless, there are three main lessons that stand out in the growth of the AES, particularly:

- i. Building credibility with members and the wider community is an important step in the process of establishing a VOPE. This takes time and is dependent on the quality and consistency of some cornerstone recurrent deliverables such as the conference, the workshop program, a professional journal and good mechanisms for member communication and interaction.
- ii. Governance processes are important and take time to develop in building a strong basis for the operation of a professional society. Each step of installing governance processes takes time and effort on the part of the leadership and membership to ensure that the processes are relevant and efficient. As the organisation changes, there is a need to regularly review and update procedures so that they continually support the existing membership and encourage growth.
- iii. The AES has had to gradually develop a business model that balances income generation with professional interests and sector developments. This has required that the operations of the Society grow and develop through its strategic planning process and in line with member expectations. Service delivery and capability have been critical to AES's sustainability and success.

Brazil – Brazilian Monitoring and Evaluation Network (BMEN)

Strategy and implementation: Based on the conceptual framework for national evaluation capacity development, BMEN has contributed to:

- Strengthening an enabling environment by putting together a community of 3,660 people (half of them public servants from Federal, States and Municipal governments); by creating spaces for debates; by promoting discussions about which capacities Brazil has and which ones have to be developed, by disseminating knowledge and good practices; and by evolving a professional association.
- Developing/strengthening individual capacities to conduct credible and useful evaluations.

Future Prospective:

- A partnership with the Inter-American Institute for Economic and Social Development (INDES/IDB) and Municipal National Confederation (CNM) is being negotiated to translate and adapt the content of the course “Management for Development Result in Sub-National Governments” to be offered for the public managers of municipal and state levels.
- A partnership with the EvalPartners Initiative is being negotiated to design a 10 unit e-learning course for civil society (NGOs and municipal councils).
- An articulation between several stakeholders is being made for the creation of a Regional Center for Learning on Evaluation and Results – CLEAR in Brazil
- The BMEN is also involved in translating selected evaluation textbooks into Portuguese.

Bottlenecks/challenges:

- Raise awareness of the parliament and the media about the importance of bringing to society this kind of knowledge and of the public administration to incorporate these values and practice to the policy cycle.
- Articulate the processes of Capacity Building, making the supply correspond to the demand.

Next steps: The Management Committee is building together a strategic plan, based on the Balanced Scorecard method. We have defined objectives for four perspectives: society, clients, internal processes and “learning and competencies.” Just one is listed below:

1) Society’s Perspective

- Improve society’s participation in the formulation of policies, plans, programs and projects and their M&E.
- Incorporate M&E in the processes of planning and formulation of policies, programs and projects.
- Improve the quality of M&E.
- Improve communication of the results of M&E.
- Contribute to the effectiveness of policies.

Canada: Canadian Evaluation Society (CES)

Strengthening an Enabling Environment

CES seeks to influence:

- Federal government
- Provincial governments (chapter responsibility)
- Evaluators
- Those who engage evaluators

Local chapters contribute substantially through their advocacy activities to creating an environment that supports quality evaluation. Because much of our membership works within government, there are a number of activities that are not directly related to the CES, but reflect the CES’ position in regards to quality evaluation.

Progress and results: It is difficult to outline all of the progress and results over the past 32 years. At this point CES is fairly strong with advocacy – being known, heard and respected:

- With the federal government at the national level
- With the provincial governments at the chapter level

And with representing the evaluation community:

- On the Joint Standards Committee
- On the IOCE Board/EvalPartners
- With the Consortium of Universities for Evaluation Education

Côte d'Ivoire: Réseau Ivoirien de Suivi et d'Evaluation (RISE)

A study was carried out in 2010 to assess the national evaluation capacity in Côte d'Ivoire. The diagnostic study was an initiative run by the Ministry of State, Ministry of Planning and Development, with the financial support of UNICEF. It came after the diagnostic study of the institutional framework of national evaluation practice which had been carried out in 2008 within the framework of the elaboration of the National Control, Monitoring and Evaluation Strategy (*SNCSE – Stratégie Nationale de Contrôle Suivi Evaluation*). The study is in direct line of the pilot studies already carried out within some countries of Central and West Africa with a view to preparing a global plan for reinforced sub-regional evaluation capacity building.

Innovations and lessons learned

A VOPE that wants to be well organised and last over time needs to have determined people with a vision centered on the extension of evaluation. The technical and financial support of partners is important if the activities of the association or network are to be able to start off, considering the absence of resources during the first few years. Technical support from the government is also essential. Indeed, the technical and logistical support provided by the Ivorian government (e.g. technical Secretariat, offices, etc.) allowed the creation of RISE. Government support was made effective through the technical and logistical support brought by the Directorate of Coordination, Control and Evaluation (DCCE) of the Ministry of State, Ministry of Planning and Development.

In order to ensure continuity in its activities, a network or association needs to have a permanent secretariat. However, it must first make sure it has the financial resources to hire the staff.

Finally, only a strong network with adequate resources and the support of a government structure such as the Ministry of Planning in charge of the conception of the national development Plan can bring the Government to elaborate and adopt a policy of promoting

monitoring and evaluation, or to get the Ministries and Institutions of the State to allocate a budget to the activities of M&E.

Egypt: Egyptian Research and Evaluation Network (EREN)

Advocacy for Evidence-based Policies: bridging the gap between policy makers and researchers/evaluators

Since its start, EREN was keen to contribute to creating the enabling environment to professionalize the function of evaluation and to utilize it for improving programming as well as for providing evidence for equitable decision-making. At the 2008 Symposium, a key EREN member prepared a policy paper that explored the situation of evaluation in Egypt and analyzed the challenges of evaluating the development interventions in the Egyptian context. This paper was presented in the presence of participants who were representing national and international decision and policy makers. There it was frequently emphasized the urgent need to advocate for paradigmatic shift in the thought and practice of evaluation in Egypt and the importance to link it to policy-making and to programmatic excellence.

EREN was keen to primarily partner with the Centre for Project Evaluation and Macro Economic Analysis (PEMA) under the Ministry of International Cooperation (MoIC), to have the network formally established. Due to the instability in the period after the Egyptian Revolution, partnership with the Ministry was weakened. However, MoIC is expected to auspice the upcoming national conference that EREN plans to conduct on “Country-Led M&E to Enhance Efficiency and Accountability”. This ministry is an important national partner, since it is responsible for planning as well as for monitoring and evaluating aid effectiveness in Egypt. In addition, an expected partner in this conference is the Ministry of State Administrative Development that is mandated to monitor and improve the performance of the Public Sector in Egypt. In addition, it includes the “Transparency and Integrity Committee” whose mission is to enhance transparency and integrity efforts.

Lessons Learned:

- It is good to start from bottom-up and to gain constituency; however having the support of the political and administrative leadership is vital and significant to establish the network faster.

- Adoption of a policy advocacy strategy is one of the main strategies an evaluation network should be concerned about.
- Expand the membership to include different key players and influential members from the beginning, as this would boost the energy, enhance confidence in the network and help to work on the policy level.
- Seek to implement joint programmes and initiatives, as this would help in investing on efforts and on resources.
- Choose the agents of change and make them your façade of promoting the network and defending it whenever needed.
- Build a good linkage between knowledge management, research and evaluation.
- Last but not least, work intensively to attract the private sector and the media as both can easily support the whole initiative whether in generating resources and collective responsibility or in utilizing evidence and evaluation results in evaluation and especially in media channels.

Europe: European Evaluation Society (EES)

EES sees the European Union as an important player through which the EES can help support good practice in regional and national evaluation.

In Europe over the last ten years the evaluation community has become increasingly aware of the differentiation of evaluation cultures from country to country. The extent to which evaluation is actually sought by (and built into) civil society and government institutions varies enormously. In some administrations evaluation is done routinely. In others it is virtually absent. The mandatory evaluation of EU-funded programs at EU level but especially in the EU regions, has acted as a major driver in the growth of evaluation practice in Europe.

Strategy and implementation of a programme to strengthen the enabling environment

- The EES and NESE (Network of Evaluation Societies in Europe) work together to promote national evaluation societies in Europe with a view to strengthen the evaluation culture of national governments and the civil society.

- The EES produced a general statement on Ethics and Standards in 2004. This document encouraged the creation of standards in national societies, but explicitly ruled out the formulation of 'European standards'. Next, the EES developed an evaluators' capabilities framework that was validated through two surveys. Again, the intent was not to impose Europe-wide standards but rather to encourage professional development and the promotion of an evaluation culture adapted to country contexts.
- The EES capabilities initiative responds to a groundswell of interest in evaluation competencies. With growing pressures for more accountability in government, the private sector and the voluntary sector, demand for evaluation services has increased rapidly and expectations have risen regarding evaluation quality. In response, many European evaluation societies have issued guidelines focused on evaluation ethics and processes. All such guidelines assume that evaluators are equipped to meet appropriate standards of professional practice. In line with this presumption, a voluntary set of capabilities associated with the practice of evaluation in Europe is intended to complement existing ethical guidelines and put the capping stone on the trilogy of ethics, standards and qualifications that underlie all professional designations.
- The EES has influenced ongoing and dominant evaluation debates and discourses by the provision of statements and manifestos. An example of this is the influential statement on impact evaluation in 2007 titled "The importance of a methodologically diverse approach to impact evaluation".

Key enabling factors:

1. The regional nature and the possibility of influencing at the supranational level;
2. A strong set of partners and allies, both at the international (IOCE and others) and national level (through NESE and national societies);
3. Dedicated Boards over the years. The EES has not had a problem in recruiting active and committed members to the Board which is an indicator of the potential for regional organizations for evaluators.

4. The opportunity of having a professionalized service provider who is open to on-the-job training.
5. A natural route to influence at regional government level with good relations with the relevant EU contacts and 'gatekeepers'.

France: Fonds pour la promotion des Etudes préalables, des Etudes transversales et des Evaluations (F3E)

The overall objective of F3E since its creation has been to help NGOs – and, more broadly, non-state actors (NSAs) or civil society organizations (CSOs) – become more professional, by giving them recourse to study procedures and external expertise, in response to their particular needs as development actors.

In line with its conception of evaluation, F3E emphasises the involvement of the different stakeholders concerned by an evaluation, with a view to dialogue and cooperation regarding practices and the actors being evaluated. It considers that the stakes and challenges of the multiple actors are at the heart of development impact and effectiveness issues.

F3E has also strengthened the strategic dialogue with French public authorities and with other groups of NSAs. The spirit of this dialogue is based on the idea that the NSAs act of their own initiative and are financially supported by public authorities, not as operators, but as development partners.

Since its creation, and by its very purpose, F3E has been contributing to strengthening an enabling environment for evaluation in France: F3E is a system that favours the institutionalisation of evaluation in the sectors of international solidarity, decentralised cooperation and inter-hospital cooperation.

F3E also contributes to strengthening evaluation capacities and the emergence of an enabling environment in the Global South: Involvement of Southern stakeholders in the evaluations; management and coordination of a French-language evaluation portal (until 2009); support for the organisation of the first Senegalese evaluation days (in 2008); participation in the Réseau Francophone de l'Evaluation (RFE – Francophone Evaluation Network). F3E participates regularly in evaluation steering committees working on French public aid for development, in order to speak for French non-state actors.

A cross-cutting issue is capacity building and the empowerment of partners in the Global South. Work is currently being done on analysing the strategies of French NSAs for strengthening capacities and local governance. The goal is to produce methodological references to define, implement, monitor and evaluate a strategy for strengthening partners, whether they are civil society organisations or local governments.

Indonesia: Indonesian Development Evaluation Community (InDEC)

Indonesia has been struggling to improve the governance for delivering development outcomes. With greater decentralisation and higher degree of democratisation at sub-national and local levels, the public now has more voice to demand better government performance in delivering development results. It is also accompanied with the re-emerging New Public Management thinking that drives most public organisations to find better ways to manage their performance.

Every government agency in Indonesia has moved towards an evaluative culture. But it is still a long journey to go. At this stage, the main focus is still on the *monitoring for performance* and not yet on *evaluation*. It is supported in the form of a legal framework through different kinds of laws and government regulations. At the national level most national government agencies have established monitoring and evaluation as they are trying to meet the expectation of having a more structured way/mechanism in operationalizing their institutional imperative or directive pressures towards managing for performance.

Members of the Indonesian public are now more active and critical in monitoring the way government implement their mandate to deliver public service. Each program now is considered to be important for scrutiny through an M&E process and to get publicly published in a more transparent way. Thus it triggered significant demand for M&E specialists to support government (national and local) in measuring performance, evaluating their development programs and disseminating their the success (and failures).

Now we have significant numbers of development professionals entering this M&E field, and unfortunately not all with sufficient competence and skill. For more quality work and output, these new-entry M&E professionals need a platform for knowledge exchange and capacity building.

InDEC seeks to influence different ranges of stakeholders, through their active membership and participation in the organization, and also any kind of engagement. The key stakeholders that we are trying to engage & influence are:

- (i) *Government officials* (national and local): so they can have capacity to demand for and manage evaluation, as well as use evaluation results/findings;
- (ii) *Members of Parliament*: so they know how to demand and use evaluation results/findings to enhance their supervision mandate;
- (iii) *Academia*: so they can develop and enhance the theoretical thinking on evaluation;
- (iv) *M&E Professionals working in NGOs, CSOs, or project/programs funded by donor agencies*: so they can improve their practice in M&E;
- (v) *Independent Evaluators*: so they can improve their evaluation practice;
- (vi) *Media People*: so they can play a bigger role in mainstreaming evaluation.

Performance-based Planning and Budgeting has been mainstreamed in the national development planning and budgeting system. Several laws and regulations have been passed to set a framework for monitoring and evaluating the performance of the development program. There are now no less than 28 laws and government regulations pertaining to M&E (20 among them specifically discuss performance evaluation). However, if we review them carefully, those legal frameworks seem to focus mostly on *reporting*, less on *monitoring*, and almost nothing on *evaluation*. We would not consider those legal frameworks as a national M&E policy or system.

One of InDEC's key advocacy events was the national evaluation seminar on promoting the M&E system for the Master Plan for Acceleration and Expansion of Indonesia Economic Development (MP3EI). InDEC also broadcasted the first press release and was successfully published in national online media (okezone.com). InDEC has also engaged with government institutions (National Development Planning Agency and Coordinating Minister for Economic Development) as partners. During the event, InDEC tried to convince a significant number of people, including high officials in the government institutions, to put serious thought in establishing

proper M&E policies and system for MP3EI and allocate proper resources for operationalizing the M&E system. It was considered to be an achievement because after that session the M&E Working Group for MP3EI has been supported by Government and UNDP.

Kenya: Evaluation Society of Kenya (ESK)

The driving force for ESK is the need to provide professional M&E input into Kenya's development agenda through multi-stakeholder collaborations. Accordingly, in recognition of the important role that evaluation professional bodies may play in development, the absence of a vibrant professional evaluation organisation in the country was a strategic opportunity which ESK seized to fill the existing gap. It is also reinforced by a changing landscape in the country with a new constitutional dispensation where the combination of an informed, active citizenry and vibrant media are keeping the government awake in meeting very high expectations, including the observance and practice of transparency, accountability and effectiveness in service delivery. Further, globally there is a growing recognition that national capacity development for monitoring and evaluation systems (including those of professional organisations) is an essential part of the broader support to policy reform and to promoting national ownership of evidence-based decision-making aimed at enhancing development at all spheres of life. Towards this end, support for nurturing the professional growth and contribution of its members to the evaluation profession as a whole is central to ESK's objectives.

Collaboration with government

ESK has continued to receive strong support from the NIMES (Kenya's National Integrated Monitoring and Evaluation System). Recently ESK organised a very successful high visibility launch. The event was organised jointly with the Ministry of Planning through the Monitoring & Evaluation Directorate (MED) within a three-day inaugural national M&E week that is earmarked to be held annually.

ESK in partnership with MED and other Development Partners used this platform to contribute towards the enhancement of the culture and demand for M&E in the country (which is relatively weak currently). It also provided an opportunity to raise the visibility of ESK and the NIMES as instruments for tracking and communicating development results as well as the sharing of experiences and learnings to encourage the culture of dialogue. The theme and

agenda of the launch focused on ESK's objectives, strategies and the benefits of having a vibrant professional evaluation society in the country and the role it will play.

Participants were drawn from the national and sub-national levels including CSOs, Government, UN Agencies, Academia and Research institutions among others. The media covered the event. Key note addresses were made by the assistant Minister for planning, UNICEF's Country Director and DFID's high-level representative from the UK Evaluation office. Other speeches were made by MED, a representative from UNDP and the ESK chair. During the event, the UN Women also conducted a workshop on "*Evaluation from a Gender Equality and Human Rights Perspective*". The universities also made a presentation on an initiative for developing an M&E curricula that is being supported by MED and UNICEF.

Innovations and lessons learned:

- Mobilization of M&E practitioners who supported the initiative from the start;
- Commitment by steering committee members is very critical to successful operationalization;
- Backing by the government from the onset is important to build credibility of the Society;
- Involving the members through wide consultations and using instant communication channels (e.g. the e-platform) to keep them updated e.g. in the development of a constitution and strategic plan for ownership and goodwill;
- There is a need to now involve other development stakeholders especially for the effective implementation of the strategic plan.

Kyrgyz Republic (Kyrgyzstan): The National Monitoring and Evaluation Network of the Kyrgyz Republic (Kyrgyz M&E Network)

Both of the first Kyrgyzstan's development plans contained monitoring and evaluation sections. More importantly, both of these strategic policy documents were developed with the participation of civil society organizations.

In 2006 a study of M&E services in Kyrgyzstan was conducted, which recommended: a) building the capacity of civil society organizations for monitoring and evaluating country development

programs and policies; and b) establishing a professional evaluation organization that would be able to lobby on evaluation issues and contribute to reform efforts in an organized manner. The findings of the study were presented at an M&E conference that was organized by the Soros Foundation-Kyrgyzstan and attended by representatives of civil society, the government as well as international donors. That conference helped to identify the main issues and needs in terms of cooperation between the state and the civil society, in particular improving government transparency and developing an evaluative culture to ensure good governance in the public administration.

In 2011 Network members initiated the production of two papers analyzing the legal and institutional environment for evaluation in Kyrgyzstan, as well as the possibility for civil society's participation in policy evaluation. These analytical briefs were submitted to the national Parliament and Government for consideration.

After the April 2010 violent events in the country and the subsequent complete overhaul of the government, Network members took part in formulation of the "government evaluation methodology." The methodology was approved by government resolution. At present, the efforts of the Network focus on how to implement this methodology in such a way that evaluation results would be used in decision making. Negotiations are underway on ways of building institutional connections among government and civil society bodies in the formulation and evaluation of government programs.

***Morocco: Association Marocaine de l'Evaluation (AME)
= Moroccan Evaluation Association (MEA)***

The MEA contributed significantly to the inclusion within the New Constitution of Morocco of the principle of public policies evaluation (July 2011). The term of evaluation is cited nine times and appears as a key thematic on which the State focuses its ambitions in order to renovate public affairs management.

However, the engaged initiatives, for the meantime limited, do not yet allow speaking about a real structured process of evaluative functions. Among the limits, we can mention the following:

- Absence of evaluation institutional dispositions within the Prime Minister's Cabinet and the Parliament, in charge of appreciating current or emerging development sector strategies;

- Evaluation practice in Morocco has little incidence on the redefinition of public action;
- Lack of knowledge of the requirements of evaluative steps, particularly independence and credibility;
- The evaluation practice deals primarily with special projects and programs (i.e. National Initiative of Human Development, United Nations System, World Bank, etc...)
- Difficult access to data;
- Absence of scientific research in the field of public policies evaluation.

In fact, the evaluative culture in the Moroccan politico-institutional landscape is still at its beginning. Except for some sectorial mechanisms for information collection, effective evaluation works remain very rare and are not rendered public. However, this situation will certainly improve thanks to the New Constitution of July 2011.

New Zealand: Aotearoa New Zealand Evaluation Association (anzea)

The New Zealand public sector is often considered to be one of the 'early adopters' of results-based accountability structures and systems. New Zealand's public sector reforms beginning in the 1980s and continued through the 1990s are regarded as having enhanced public sector responsiveness and accountability, focusing public sector managers' attention on their performance.

Over the past 20 years there have been a number of initiatives aimed to achieve a greater focus on outcomes within the New Zealand public sector including:

- Chief Executive Forum – launched in 1993 as a platform to promote the idea of a strategic, longer-term outcome perspective;
- Strategic Result Areas (SRAs) – a coordinating device launched in the early 1990s (and existing until the late 1990s) which aimed to foster coherence in policy, planning and operational activities by defining medium-term, government-wide priorities at Cabinet level;
- Key Result Areas (KRAs) – set at departmental level and, as such, belonging to the prerogative of the chief executives;

- Managing for Outcomes – where the focus of accountability was moved to the outcomes that the agency was intended to achieve, with the results of particular programmes being assessed against the wider outcome that was to be achieved; and
- More comprehensive sector reporting – beginning with the environmental sector in 1997.

In spite of many years of results or outcomes-based reforms, the wider enabling system for evaluation has not been all that strong or committed, as the more recent formation of a national evaluation association illustrates. One exception is in education, where evaluation has been well institutionalized. At compulsory and tertiary levels there are now agencies with evaluative oversight of educational quality and improvement. However, in the main, the collection of information on performance has largely been driven by accountability requirements, and there has been little demand for evaluative information for management decision-making or improvement. A recent survey of 1,700 managers across a range of government agencies found that more than a third of managers (38%) didn't have information that gave them a good picture of how they were doing and almost half (47%) didn't have information that helped them to understand how to improve their performance or the impact of their work on the public (56%) (Gill, D (ed.) *The Iron Cage Recreated: The Performance Management of State Organisations in New Zealand*, 2011.)

A step recently taken by the new national evaluation association, **anzea**, towards strengthening the enabling environment for evaluation in New Zealand has been the recent development of a set of evaluation competencies for Aotearoa / New Zealand. The approach taken by **anzea**, has been to ensure the competencies have the broadest application, i.e., enhancing the knowledge and demand for quality evidence by funders and commissioners of evaluation, as well as building the quality of the supply of evaluators to provide evidence.

Niger: Réseau Nigérien de Suivi Evaluation (ReNSE)

The increasing interest in the monitoring and evaluation of policies and development programs and in results-based management led Niger, among other countries from the sub-region, to participate in 2006 in a diagnostic study of national evaluation capacity. The role of ReNSE in promoting a culture of evaluation was acknowledged.

The results of the study showed that evaluation in Niger is mainly considered to be a statutory obligation partly driven by the technical and financial partners involved. The study revealed the increasing importance given to the development of evaluation in Niger and highlighted that the decentralization of evaluation practices, the reinforced anchoring of evaluation functions in institutions, the development of training and the professionalization of evaluation were the main strategies to be considered for the development of evaluation capacity of Niger. This diagnostic of evaluation capacity led to a keen interest in and a political will to promote a culture of evaluation.

ReNSE is currently elaborating a strategic plan and envisages to begin, with UNICEF, a training program designed for actors and civil servants of the local authorities to learn the use of evaluation tools, with a special emphasis being put on evaluations and evaluation systems focused on equity and gender, e.g. through the promotion of issues regarding cultural sensitivity, equity, social justice, empowerment, transformation and equality between the sexes, supported by the evaluation community.

Essential Factors

Active members of ReNSE pursue the promotion of evaluation in the structures where they exercise their technical functions and call upon other ReNSE members competent in evaluation for capacity building.

The voluntary engagement of the government structure in charge of evaluation has contributed to make ReNSE a credible and unavoidable partner within the administration and to spark interest in evaluation by most of the stakeholders.

The training activities in M&E and the promotion of an evaluation culture have led Administration officials to introduce aspects relative to monitoring and evaluation in the legislation and regulations.

Innovations and lessons learned

- Training and capacity building aimed at better articulating the norms and standards of AfrEA with those of the technical and financial partners;
- A good division of labor, not only among members of the Coordination Committee, but also with the other members of ReNSE;

- Efficient communication via the internet (e.g. website, newsletter, etc.);
- Consolidating good partnerships with the actors of development both at national and international levels;
- Demand in evaluation capacity building increases as dissemination continues.

Romania: Romanian Evaluation Association (EvalRom)

In 2010 EvalRom implemented a project funded from an EU grant scheme (called “Transition Facility”) focused on promoting transparency and public accountability in Romania. The project included two workshops (one for increasing the capacity of NGOs to use evaluation and one for media to use evaluation reports in their work), a conference at the Parliament for promoting evaluation as an instrument of public accountability, and a study on the evaluability of the public policies in Romania.

Since its foundation, EvalRom actively participated in activities related to the development of national evaluation culture. For example, in 2008 EvalRom organised, together with the Evaluation Central Unit, workshops in two regions remote from the capital city. The workshops aimed to promote EvalRom and to raise participants’ awareness on evaluation. EvalRom organised a plenary session dedicated to evaluation and neighbouring disciplines as part of the National Evaluation Conference organised by the Evaluation Central Unit in 2009.

EvalRom is providing ad hoc advice in evaluation to the central authorities. In 2009 EvalRom was asked by the Prime Minister’s advisor on public administration to undertake a study on the national evaluation system. Also, EvalRom representatives actively participated in events organised by the Evaluation Central Unit focused on discussing the Action Programme for the Development of the National Evaluation Capacity (roundtable in 2008) and the evaluation culture in the system of Structural Instruments in Romania (roundtable in 2012).

Senegal: Senegalese Evaluation Association (SenEval)

Since its creation, the main driving forces and result areas for SenEval have been the following:

- Development of evaluation capacities, starting with its own members;
- Advocacy for the promotion of a culture of evaluation at the national level;
- Development of the institutionalization of evaluation by the State.

A diagnostic study of evaluation capacities entitled “Evaluation as a Democratic Requirement” was conducted in 2006 with the support of the International Organization for the Francophonie and technical backup from Professor Frederic Varone. Amongst the main recommendations of the study are the need to: a) organize a high level national workshop on the evaluation of public policies; b) improve the availability of in-country training; c) create or strengthen the planning and M&E functions in line ministries; d) identify an appropriate administrative structure to house the evaluation function; e) promote an evaluation culture, through initiatives such as SenEval; f) elaborate a national evaluation policy/strategy with three objectives: the institutionalization of the evaluation function, the improvement in the quality and scope of evaluation practice, and the promotion of an evaluation culture.

SenEval has advocated for the institutionalization of evaluation targeting principally the Presidency of the Republic, the Delegation for the Reform of State and Technical Assistance (DREAT), the General Directorate of Planning of the Ministry of Economy and Finances, and the Government Inspection Office (*Inspection Générale d’Etat*). The technical challenges attached to institutionalization and the high stakes have been frequent themes of SenEval meetings.

This long running advocacy coupled with specific advice from certain influential members of SenEval have contributed to the government’s recent decision to establish in the President’s Office a Commission for the Evaluation and Monitoring of Public Policies and Programmes. SenEval aims to get involved in the process of institutionalization initiated by this decision.

SenEval's experience reconfirms the critical importance of government action to institutionalize evaluation. The institutionalization should include the adoption of appropriate evaluation standards, and practical arrangement for capacity development to improve evaluation practice. It is essential to identify actions and strategies to promote the "demand" for evaluation.

South Africa: South African Monitoring and Evaluation Association (SAMEA)

The most influential initiative, led appropriately by Government, was the establishment of the Department of Performance Monitoring and Evaluation (DPME) in 2010. DPME is placing evaluation units or departments in each of the three tiers of government, at the national level located in the Office of the Presidency, at the provincial level located in the Office of the Premier in each of the 9 provinces, as well as in local government offices. In doing so, DPME has provided, amongst others, a national evaluation framework, Evaluation Plan, evaluation standards and competencies, each strengthening an enabling environment for evaluation, which at the same time lays a foundation for strengthening accountability, transparency and managing for results. With its establishment has come a new emphasis namely, strengthening evaluation systemically.

Next in creating an enabling environment for evaluation are two initiatives, both located in universities as host institutions of evaluation: the CLEAR initiative at the University of the Witwatersrand and Crest at the University of Stellenbosch. The former is a World Bank initiated and supported initiative with the aim of evaluation field building in Southern and Anglophone Africa by working closely with governments on multiple evaluation-related activities, including mapping the field and growing scarce evaluation skills in governments. It offers specialist capacity building courses and scholarships enabling those with limited resources to attend; funds evaluation activities with government relating to evaluation demand; evaluation projects such as developing evaluation standards and competencies; tracking university courses in evaluation; and the like. The Crest Centre more specifically focuses on high level specialist courses in evaluation leading to both post-graduate diplomas and to degrees up to and including a PhD. With both initiatives targeting individuals and governments in Southern African and sub-Saharan African countries, they strengthen an enabling environment for evaluation here and beyond our borders.

Creating an enabling environment for evaluation aimed at strengthening accountability, transparency and managing results is larger than SAMEA, but includes it as a leading national professional association. Creating an enabling environment, for the most part, is led by the national government, strongly supported also by funded national and international initiatives, as well as other players including state departments, foundations, universities and independents. Government leads by promulgating a corpus of legislation presently institutionalizing M&E systemically at local through national levels of government, though a shortage of skills at this early stage hampers accountability and managing by results. And, with SAMEA as one player building capacity to monitor and evaluate policy implementation and programmes in and outside government, it provides a platform for debate for feedback from a specialist M&E citizenry, and it contributes to developments in evaluation. SAMEA, as a national professional association, in collaboration with partners, contributes to an environment for strengthening accountability and management to deliver on outcomes.

Perhaps the most significant bottleneck for the SAMEA Board members is work overload. Typically, members of the Board are busy professionals working long days on challenging assignments, to which is added SAMEA business. Whilst the latter may not be overly onerous, it nevertheless impacts Board member time and limits the time they are able to give to Board business, particularly in a Conference year. With this in mind, the Board in 2012 experimented with its Secretariat adding a stipended part-time position with designated time to spend on SAMEA business. This assisted the Board to consolidate its activities, and give practical effect to organizing its annual capacity building Workshop Series in KwaZulu Natal, establish a formal KwaZulu M&E association in Natal, found the African Evaluation Journal (AEJ), and other initiatives.

With SAMEA sharing similar objectives on M&E to DPME with respect to strengthening capacity building and enhancing the credibility of evaluation, both agreed to form a Standing Committee and held regular meetings in 2012 to find common ground for co-operation on matters relating to evaluation. A general Memorandum of Understanding (MoU), signed by both parties, cemented the relationship and set the scene for future collaboration. The MoU expresses the desire to collaborate on M&E issues of mutual interest. It assumes DPME as custodian of evaluation nationally and that it places a high value on having a committee formally linking it with SAMEA as national association, and it records SAMEA to be

an independent voice, namely that of an outside expert advisory national M&E association and critical friend.

Sri Lanka: Sri Lanka Evaluation Association (SLEvA)

Assisting policy formulation

One of the strengths and reasons for SLEvA's success is its strong collaboration with the Ministry of Plan Implementation (MPI) as a CSO partner in influencing policy and implementation. From inception itself SLEvA managed to maintain close ties with the Department of Foreign Aid and Budget Monitoring of the Ministry while maintaining our independence and integrity. This way we were able to influence the Government's policy on evaluation to a considerable extent.

One of our key initiatives as a result of this collaboration was the preparation and submission of Draft National Policy paper on evaluation to MPI to enable the Ministry to commence a process in formulating a National Policy. This was initiated in response to a request made by the then Secretary to the Ministry of Finance and Policy Development and Implementation at the International Conference in January 2003. The Association formulated the first draft in April 2003 and presented it for an open consultation session in June 2003. With revisions to adjust to policy changes the final document was presented in June 2006. While the process took time, the acknowledgment by the Government of the need for an evaluation policy marks a milestone in strengthening an evaluation culture in the country and the draft policy is a significant product of SLEvA. The Ministry of Plan Implementation has taken steps by now to institutionalize evaluation practice across the government in support of results-based management.

TEACHING EVALUATION IN SOUTH ASIA

COLLABORATION AMONG VOLUNTARY ORGANIZATIONS FOR PROFESSIONAL EVALUATION, ACADEMIA AND DEVELOPMENT PARTNER

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Introduction

This paper discusses the role of academic institutions in promoting the culture and field of evaluation in South Asia. It focuses on the experience and lessons learned from the programme “Teaching Evaluation in South Asia” (TESA), which is designed to strengthen evaluation professionalization in South Asia by institutionalizing evaluation training in academic institutions. The programme is a collaborative effort between three partners: A consortium of academic institutions, a Voluntary Organization for Professional Evaluation (VOPE), which is the Sri Lanka Evaluation Association (SLEvA) and a development partner which is the International Development Research Centre (IDRC).

Evaluation is a very natural phenomenon. People evaluate things all the time. However, formal evaluation has a disciplined and methodical approach to this natural and common sense activity. Many

people are mystified by the claim that it is a profession (George F. Grob: 2009). This is largely because, unlike most physical or social sciences, evaluation has emerged as a distinct profession only recently. In several aspects, it is still evolving.

General status of evaluation teaching in South Asia

In South Asia, as in many other regions, there has been an increasing demand, at various levels of government, for effective and focused evaluation of development efforts. Governments in developing countries are increasingly seeking accountability in the development process. At the same time development partners and donors are also demanding good governance, and effective use of increasingly scarce development resources towards achieving better outcomes. Mechanisms and systems in place are unable to meet the new challenges and hence these expectations and changes have made evaluation an important instrument for accountability, performance management and organizational learning.

Development of a culture of evaluation or what Katherine Hay (2011) has holistically described as “evaluation field building” particularly in the developing countries, has several challenges. It not only requires a political will and institutional design to internalize evaluation, but also involves capacity (building) and professionalization to effectively carry out the evaluation function.

The South Asia region suffers from a dearth of professional evaluation expertise and the absence of an adequately developed evaluation culture to support national development processes. Evaluation practitioners have limited access to high-quality academic courses and practical training in evaluation, which consequently has hindered the evaluation capacity in the region. Most countries do not have well established professional associations or networks that can facilitate exchange of academic advances and practical experiences. While the importance of evaluation in the achievement of national development results have been increasingly recognized in the public sector, among civil society organizations, within the United Nations system and in multilateral and bilateral development partners, adequate systematic opportunities do not exist to generate capacity in the countries in the region. This is especially so in the mainstream educational programmes at colleges, universities and institutes of higher learning.

To aid the discussion about the realities on the ground, we draw upon what George F. Grob (2010) has described as the fundamental pillars for a national evaluation system. These are:

1. Understanding evaluation types and methods and how policy makers and managers use them
2. Appreciating the relationships among evaluation and related professions
3. Establishment of government agencies that evaluate public programmes
4. Freedom and encouragement for growth of non-government evaluation organizations
5. Evaluation education and training programs; and
6. Professional standards.

A close look at these expectations reveals that capacity building and professionalization is at the core of this framework. Other authors such as Carden (2007) have also emphasized the importance of capacity building and professionalization of evaluators to bridge the gap between them and the users of evaluation. But where do we stand in terms of evaluation capacity and professionalization in South Asia? Shiva Kumar's (2010) observations in the context of India broadly depict the scenario in South Asia.

"At a macro-level, India has a reasonable (even impressive) capacity to undertake evaluations. Indeed, many well-established universities, policy think-tanks, social science research institutions and colleges – both within and outside government – have a pool of experienced evaluators. However, on closer examination, we find that there simply aren't enough institutions with the capacity to conduct evaluations for a country of India's size and diversity. Also, evaluation capacity is unevenly spread across the country.... few states have evolved a strategy to develop adequate capacity to carry out evaluations at the state, district and village levels."

Shiva Kumar further adds that: "...professionals carrying out evaluations in South Asia...tend to be good social science researchers, not trained evaluators."

Katherine Hay (2011) also notes that "Much evaluation in South Asia is certainly led by 'craftsmen' but a great deal is also led by researchers who, despite in some cases spending a large portion of their time leading or as part of evaluation teams – do not identify as

evaluators (whether of the professional or specialist variety). Thus, while they draw on the theories, tools, and approaches from their various disciplinary backgrounds they are less likely to be aware of, draw from, and contribute to the field of evaluation whether as rooted within particular disciplines (such as education or public health) or development evaluation more broadly.”

These words clearly indicate the gaps and grey areas for further improvement.

Teaching Evaluation in South Asia – A response

It is in response to this situation that a group of academic institutions in South Asia came together to form a Consortium of Academic Institutions for Teaching Evaluation in South Asia (TESA). The members of the Consortium are those who responded to a call for expression of interest by UNICEF Regional Office for South Asia through the print media, and who met the feasibility criteria of an assessment carried out by the World Bank Independent Evaluation Group. The Consortium was of the view that for sustainable professional growth of evaluation competencies it is essential to make regular academic and professional training available at the higher academic institutions within the countries of South Asia. The Consortium, in collaboration with UNICEF South Asia, experimented through the teaching of a short executive level course based on a common curriculum. The curriculum was developed jointly by London Metropolitan University and Carlton University. The faculty, who are members of the Consortium, having been familiarized with the curriculum, conducted executive level courses at their respective institutions. Spurred by this experience, the Consortium in collaboration with IDRC moved a step further to establish evaluation training at a post graduate diploma level, as a regular programme in their respective institutions.

The members of the Consortium included the IbnSina Institute of Public Health and Management Sciences, Kabul, Afghanistan; the Administrative Staff College of India, Hyderabad, India; the Indian Institute of Health Management Research, Jaipur, India; the University and Industry Alliance, the University of Dhaka, Bangladesh; Lahore University of Management Sciences, Pakistan and, the University of Sri Jayewardenepura, Sri Lanka. Based on the knowledge and experience of similar efforts, that formalizing new structures

could take a great deal of time and effort, the Consortium decided instead to function as an informal network. However, it needed a mechanism for coordination and operational management. This role is played by the Sri Lanka Evaluation Association.

Since the establishment of the Consortium, two institutions have discontinued and two others joined on invitation. To provide a sense of the collaborating institutions a brief introduction to the Consortium members is of value. The current members are as follows:

- The IbnSina Institute of Public Health and Management Sciences (IPHMS) is a higher education and professional training institute under the IbnSina Public Health Programme in Afghanistan. The institute provides training in management and public health to participants from Afghanistan and other countries.
- The Administrative Staff College of India (ASCI) is a think tank and a pioneer of evaluation practice in India. It is one of the leading institutions in India providing training, research and consultancy services to government, industry and international agencies.
- The Indian Institute of Health Management Research (IIHMR), Jaipur, is an institute that established health management as an important discipline in India. The research conducted by the institute has contributed to strengthening and facilitating health sector reforms and a range of planning and policy level interventions.
- The University and Industry Alliance of the University of Dhaka, Bangladesh, is a well-placed institution in Bangladesh to promote evaluation teaching and practice. It is in a position to promote networking among universities and practitioners in public and private sector organizations.
- The University of Sri Jayewardenepura is one of the leading universities in Sri Lanka. It is committed to professionalize evaluation by introducing evaluation training through its Faculty of Medical Sciences.
- Himgiri Zee University, Uttarakhand, India, is a research based multi-faculty and interdisciplinary University sponsored by the TALEEM Research Foundation, Ahmadabad.
- Institute of Public Enterprise, Hyderabad, India.

The long term purpose of TESA is to build evaluation capacity by training and research in member institutions to expose and encour-

age students to undertake higher levels of learning in evaluation. The expected outcome is that the participating academic institutions will establish capacities to deliver academic evaluation programmes in their respective institutions. This is expected to contribute significantly to the strengthening of an evaluation culture through the presence of academically qualified professionals in the countries. Three outputs are considered necessary and sufficient to yield this outcome. These three outputs to be produced in the programme are:

- i) a curriculum designed, tested and agreed upon to be used as a common pedagogy for all institutions;
- ii) a core group of faculty members with capacity to teach the curriculum; and
- iii) administrative arrangements in place to conduct the post graduate diploma.

TESA has now successfully completed the first output by producing the curriculum. Work on administrative arrangements for institutionalizing the evaluation course is at various levels of progress in the different institutions. Work is ongoing and further efforts are needed to achieve the third output, which is to establish a group of faculty members with competency to teach evaluation topics.

The curriculum is designed to give the students a level of awareness of the fundamentals of evaluation not only in terms of the methodologies but also in terms of some of the soft skills. For this purpose, the curriculum consists of eight modules: Introduction to evaluation and the development context of South Asia; Evaluation design; Evaluation approaches; Quantitative methods in evaluation; Qualitative methods in evaluation; Norms, standards and ethics in evaluation; Communication in evaluation, Managing evaluation. The curriculum development was driven by the need to integrate capacity development in to the process. A process of co-production was therefore adopted where senior faculty members of participating institutions worked in collaboration with evaluation professionals and teachers from the North. The resource persons provided some technical inputs, access to appropriate resources and primarily reviewed the draft materials produced by the consortium members. A Teachers' Guide was provided, which gives step-by-step guidance on delivering the modules from the basic material. Supplementary materials such as PowerPoint presentations, case studies and exercises have also been added. The process was time con-

suming but was well appreciated by the Consortium members as it has led to a sense of ownership.

A key component of the course is the *practicum*. The *practicum* is designed to be an application of the theoretical knowledge of the modules in a guided and systematic manner. It is also expected to be a product of the institution that contributes to the research and knowledge-base of the country, based on expressed needs at national or sub-national levels. The faculty would develop a plan for evaluations in consultation with relevant government and other institutions. From this research plan, appropriate and feasible components would be assigned to students as their *practicum*. Each student would develop a complete evaluation design for the assigned component. This would be done in stages as the student completes the modules. The *practicum* is integrated into each module. In the first module, for example, the students would examine the relevance and importance of the assigned evaluation in the development context of the country. In the second module, they would develop the evaluation design, and in the third and fourth modules they determine and develop the most appropriate method mix. In the remaining modules, as part of their *practicum*, they would identify ethical issues, the plans to address them, decide how to ensure evaluation standards and also decide on an effective form of communicating the evaluation process and findings. Each stage is to be completed under supervision or assessed to ensure that the evaluation meets the quality standards. Upon approval of the written evaluation proposal, students would carry out the field work and develop the communication materials. The faculty would arrange for the students' evaluation findings to be consolidated and provided as a contribution to specific sectors or programmes, as relevant.

The *practicum* is therefore designed to yield an evaluation that meets quality criteria, has utility and adds to the institution's research contribution to the country. TESA expects research to be an integral part of the course. An aim of TESA is to develop an innovative and contextualized research and training programme where both students and staff can engage in meaningful and relevant research. Possibilities of thematic research across different countries with comparable research designs will be explored so that findings can be consolidated. Promoting the use of findings will be a main focus. Rather than the traditional projects carried out by students as an examination requirement, which tend to have a narrow focus and be isolated, students will be required to make specific

contributions within an overall research design. Additionally, in close collaboration with governmental and international organizations, TESA will explore opportunities for students and staff to contribute to ongoing evaluations in South Asia or outside. Sufficient time will be allocated for this work whilst integrating the practical sessions to develop the evaluation design within the theoretical modules.

The TESA evaluation course is not limited to a diploma course at post graduate level. It can also be taught in modular form and it can be modified to suit workshops of short durations of one to two days. It can be used in this form by non-degree awarding institutions and VOPEs. Modules have already been used in this form by SLEvA. They have also been used as resource materials for evaluation workshops designed for specific purposes and audiences such as government officers. ASCI, IHMR and University and Industry Alliance of the University of Dhaka (U&I), IbnSina have used the modules in this way.

The consortium of academic institutions has benefited from several resource persons who are evaluation professionals and academia from the University of Toronto, Canada; Gallaudet University, Washington DC, USA; and, the Centre for Public Programme Evaluation, Virginia, USA. Two of the resource persons were engaged in co-production of the modules with Consortium members. Other resource persons have provided comments at workshops and reviewed several modules. One resource person set up a temporary website to help with the exchange of information during the module development stage.

Role of Sri Lanka Evaluation Association

A key feature of TESA is that a VOPE has played a central and strategic role in the evolution and functioning of TESA. SLEvA not only was an architect of the TESA concept at its inception, it also provided the operational hub for TESA. SLEvA organized all meetings and carried out the administrative and financial implementation. With this collaborative arrangement, TESA members, even though functioning as an informal network, could effectively focus on developing the curriculum and capacity development etc. SLEvA was able to play this critical partner role since it has reached a relatively stable position where a tradition of regular voluntary activities has been established. Equally importantly, a core group of members have evolved to continue the traditions. SLEvA has gained sufficient stature to attract members who are influential and com-

mitted to keep the establishment running and progressing. The collaboration has been smooth and productive and an objective review would most likely view it as a successful and mutually beneficial partnership.

SLEvA's contribution to TESA is not confined to coordination. It has also made a significant contribution to the curriculum development by developing one module and testing several others through workshops. SLEvA intends to have a programme of professional development workshops for its members and others based on the modules. SLEvA has also undertaken the management of the website.

Contribution of the funding agency

The operationalisation of the TESA concept was made possible by the International Development Research Centre (IDRC) through its acceptance of the concept of TESA and encouragement through catalytic funding support. IDRC recognizing that the very limited evaluation training and evaluation research in universities in South Asia poses a major challenge to evaluation practice in the region, is strongly supportive of this effort to develop high quality evaluation training and to establish post-graduate diploma programmes in evaluation in South Asia. IDRC has also offered other very catalytic support in terms of access to its on line library facilities for TESA members. It has also supported networking by enabling TESA participation and representation at important evaluation events. Through this process TESA collaborated with the South Asia Community of Evaluation Conclaves, held in 2010 and 2013, and that collaboration has continued.

With the agreed activities under IDRC funding due to be completed by the end of 2012, and with the IDRC phase-out of evaluation field building activities, TESA now needs to look for strategic support for its next phase. This next phase is the actual implementation of the teaching, which requires capacity for teaching the curriculum, for undertaking assessments, and to have in place the necessary quality assurance systems.

Good practices, challenges and future directions

TESA considers as one of its good practices, the approach it used to develop the curriculum, which was through co-production and collaboration. Senior academic staff of the Consortium took the responsibility to develop the modules while the resource per-

sons provided feed-back and technical inputs where needed. This approach of co-production rather than adopting an externally developed curriculum enabled the potential teaching staff to take ownership of the curriculum design and content. It also served as a capacity development strategy of learning by doing. This co-production mode was supported by collaboration among Consortium members. The Consortium members provided comments on one another's work and quite importantly tested in workshops the modules developed by other members. The presentations at review meetings, feedback from invited experts in the field, testing and piloting of the modules were good capacity development strategies that also served to enhance ownership. While enhancements will continue, an eclectic experience of institutions in developing and writing the curriculum materials has helped to complete them, and also shaped their delivery structure.

Another endearing practice of TESA is that the members of the Consortium worked entirely on a voluntary basis. The senior academic staff gave of their time and expertise to develop the curriculum in a spirit of a contribution from the institution. The funding that was available was for the purpose of meetings, to engage the services of a few experts and for basic material costs. It is of great satisfaction to the Consortium that the members did work their way through this task despite their own heavy work place schedules, even though the speed of the process could have been greater. It can be argued that what sustained this contribution are the firm commitment of the core Consortium members and the confidence of the sponsors, IDRC. This core group remained steadfast and worked through the constraints that surfaced. There is also the expectation that institutionalizing evaluation would, in the medium term, bring benefits to the institutions in terms of having a well-accepted course for which there would be a growing demand.

The voluntary basis of work by the Consortium members and a VOPE functioning as a secretariat have the much discussed limitations as well as positive spinoffs. The voluntary nature of the work means that constraints of time and resources reduce the speed of work. With respect to one main product, which is the development of the curriculum, this was not a major hindrance. The collaborative spirit that evolved and the ownership that was established did more than offset the disadvantage of a somewhat slow speed. However, it is a challenge to maintain a high level of motivation of the members of the Consortium and to make the concept attractive to institutions. The tendency of institutions is to seek quick gains as part of

their business processes. A programme that requires initial investments in terms of staff time in the expectation of fairly medium term gains pose challenges in creating a high level of commitment.

Reaching out for partnerships and networking has proved to be helpful. TESA has already received some external recognition that has inspired its work and helped sustain its momentum through networking. One such network is with the Community of Evaluators (CoE) South Asia. This networking was initiated and supported by the TESA Consortium members, being active members of the CoE. The facilitating role of IDRC that has sponsored both CoE and TESA reinforced the connections. TESA was represented in the CoE during 2012 and had a strong presence at the second Conclave in February 2013. TESA has also been able to network with SLEvA, not just as its coordinator but also as a well-established national evaluation association in the region. Some TESA members have joined SLEvA membership. A partnership with CLEAR South Asia has been explored and it is expected to be operational as further work, especially teaching, unfolds. TESA now looks forward to being an active member of EvalPartners and build peer to peer partnerships with other regional evaluation training programmes.

The major challenge for TESA is to set in place the competencies needed to teach the evaluation course. The faculty members from the academic institutions are experienced professionals in their own fields. Yet, a systemic orientation is needed for the evaluation curriculum so that all would be at a known adequate level of competencies. This is also needed to ensure a degree of uniformity across the institutions. As a step in achieving these competencies, currently, the faculty is encouraged to select the modules they are interested in teaching and, as preparation for the formal training, to review the selected modules; supplement examples; develop case studies; adapt the presentations; and to devise exercises for student assessments. A formal introductory programme, where the faculty members demonstrate the teaching of these modules and feedback is given by both peers and experienced teaching professionals, is the next major step in operationalising TESA. This introduction is to be scheduled as a series of sessions, each session focusing on a number of modules lasting about a week. During these sessions, expert professionals would co-teach to demonstrate the approach. In the medium-term TESA plans to identify emerging bright scholars who perform well on the diploma course and who are also creative and committed to become successful teachers for further academic training in appropriate universities.

For this process TESA is seeking collaboration and catalytic support from the international community and universities.

In the academic arena there are several issues to address. One issue is reaching agreement on what exactly it means to place evaluation in the South Asian context. What bearings do social norms, values and ethnicity play in evaluation methodologies, ethics, norms and standards? As TESA gains deeper understanding of these issues through its teaching, the teaching methodology will be modified.

As the next phase, simultaneously with the staff development activities, TESA is currently engaged in expanding its membership and partnerships. A number of institutions have expressed interest in joining TESA and have already participated in some events. These include Sharda University, India; the S.P. Jain Institute of Management and Research, Mumbai, India; Guru Ghasidas University, Bilaspur, India; the University of Kelaniya, Sri Lanka; etc. TESA will be delivered not only as a post graduate diploma but in several other modes. These include evaluation modules within other academic programmes such as Masters in Business Management offered by universities and professional development workshops offered by VOPEs. TESA is considering developing online programmes as short training programmes based on the modules. An e-learning programme in partnership with EvalPartners on www.MyMandE.org is already being discussed.

The TESA programme is designed as a sustainable solution to the lack of professionalization of evaluation. The programme is for the purpose of generating a steady flow of evaluation professionals from local institutions of higher learning who could promote a culture of evaluation in support of more effectively achieving development results for people. TESA has reached its early milestones. It is seeking partnerships, both South-South and North-South, for two purposes. Firstly, to take the next steps of achieving a broad based and relevant tertiary education in evaluation in South Asian countries, and to do this in an efficiently and collaborative way. Secondly, and equally important, it looks forward to sharing the experience and knowledge it has gathered with similar regional initiatives for teaching evaluation. TESA looks forward to EvalPartners which would be a forum to bring peers with similar interests enabling partnerships to be forged in pursuit of common goals.

For more information on TESA visit <http://teachingevaluationinsouthasia.org>. We look forward to receive your views, guidance and collaboration.

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Part 2

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AFRICAN EVALUATION ASSOCIATION (*AfrEA*)

INSTITUTIONALIZATION OF EVALUATION IN AFRICA: THE ROLE OF AfrEA

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AfrEA representative to IOCE

Nermine Wally

AfrEA President¹

Background

The first evaluation network in Africa, the Nairobi M&E Network, was founded by UNICEF, as were the first six national associations and networks. The first AfrEA Conference, held in 1999 in Nairobi, was originally formulated as a meeting of members of these six networks, but after discussion was repositioned as an open meeting for all evaluators in, or interested in, Africa, with advanced training offered by Michael Quinn Patton. While the conference was open to all, objectives and activities were determined in consultation with leaders and members of national networks. The leaders of those six national networks were the de facto executive board of the AfrEA in those days, later to be replaced by a dedicated elected Board. Especially supportive roles in those very early and fragile days, in addition to UNICEF, were played by CARE and CRS (Catholic Relief Services) – they both contributed funding and brought evaluation staff from across Africa to the first AfrEA conference when it was still an unproven concept.

The second conference, again hosted by UNICEF but with an increasing range of donors, was held in 2002. This conference adopted and approved the publication of the “African Evaluation Guidelines,” which had been jointly developed by the dozen national networks that existed by then. These were published in the journal of Evaluation and Programme Planning. This journal was an early

1 The authors would like to thank AfrEA past Presidents Mahesh Patel, Zenda Ofir and Oumoul Ba Tall, who provided invaluable insight and key documentation for the development of the case study.

academic supporter of evaluation in Africa and was the first journal to establish lower subscription rates for African evaluators and gave special consideration to maintaining an international balance in the evaluations it published.

At the last plenary of the second conference a President from South Africa was proposed and unanimously accepted, later supported by four selected Board members based in West, East and Southern Africa.² This led to the third conference held in Cape Town, where AfrEA for the first time officially partnered with a national government. The fourth AfrEA conference, in Niamey in 2007, was led by a Board of six persons led also by a President. Among the six Board members three were Francophone and the three others Anglophones. The fifth AfrEA conference, in Cairo in 2009, elected a President in a General Assembly plenary and via electoral ballot. Seven additional Board members were elected during the same plenary, representing four regions of Africa. Three of these Board members were Francophone. This Board ran AfrEA for two years until the sixth conference held in Accra in January 2012. During the Accra conference the 7th AfrEA President was elected, along with a new Board. It was also during this 6th Conference that AfrEA launched its draft 5-year Strategic Plan document.

Strategy and implementation

Strengthening an enabling environment

Since its creation in 1999 as a continental body, AfrEA has not directly influenced any given government in terms of national evaluation policies, though the creation of the African Evaluation Guidelines (AEG) led directly to the first set of evaluations guidelines adopted by a UN Agency and through that route, to the creation of evaluation standards for the United Nations by the Inter-Agency Working Group on Evaluation. These guidelines serve both individual evaluators and development agencies who commission evaluations on the African continent.

Nevertheless through its member associations, such as national VOPEs, AfrEA has contributed to strengthening and enabling the environment for better and more professional evaluation on the continent. As can be seen through other case studies included in this book, several national associations like RénSE in Niger, SAMEA

2 Although a North Africa representative was initially included, he later had to withdraw for personal reasons and was not replaced.

in South Africa, ReBuSe in Burkina Faso and RISE in Cote d'Ivoire have to a great extent been involved in influencing their national policies, some at the broader governmental level, others at the level of ministries. The institutional support that AfrEA provides to national evaluation associations has created and stimulated the use of more professional evaluation by Evaluation Commissioners at State level thereby stimulating the creation of evaluation departments in Ministries, and in some cases like South Africa and Niger, the creation of an entire Ministry of Evaluation. In other countries AfrEA has greatly contributed to the development and elaboration of strong national evaluation policies or frameworks.

As mentioned earlier, AfrEA has also facilitated the development of the African Evaluation Guidelines (AEG) adapted from the International Program Evaluation Standards to suit African contexts. These guidelines were developed through a rigorous consultative process involving a wide range of VOPEs in 2000, 2003 and 2006. The guidelines are intended to serve both individual evaluators and development agencies who commission evaluations on the continent.

Developing and/or strengthening a sustainable strategy to enhance individual capacities to conduct credible and useful evaluations

From the initial 1999 conference in Nairobi to the last 2012 conference in Accra, many individual evaluators, African and non-African, have been trained through professional development workshops organized by AfrEA. Roughly speaking, on average, 200 individuals have attended the professional development workshops at each conference. Without any doubt AfrEA can affirm having contributed to the enhancement of the skills and capacities of hundreds of individuals around the continent since its creation through the professional development workshops.

In addition to these workshops during conferences, since 2011 AfrEA, in partnership with the University of Wageningen-CDI and the University of Ouagadougou, have trained 76 people from different Francophone countries (West and Central Africa) in Participatory Planning Monitoring and Evaluation-Managing for Impact. This is a three year initiative through which AfrEA intends to increase and enhance the technical skills and capacities of Francophone evaluators on the Continent.

Strengthening equity-focused evaluation systems and evaluations

Since the Niamey conference in 2007, AfrEA has worked on cultural sensitivity and evaluation on the continent. The discussions have led to the concept of “Making Evaluation our Own” which has evolved to what is known nowadays as “Made in Africa Evaluation” or “African-Rooted Evaluation.” Despite the so called lack of history and culture of writing, by which Africa has been described for so many years, coupled to the colonization inheritance in terms of paradigms, epistemology and all ways of thinking that has dismissed African knowledge, know-how and skills, AfrEA believes that the paradigm is changing. It is important to notice that there are indigenous ways of thinking and doing evaluation within African communities around the continent. Therefore it is the professional and intellectual obligation of African evaluators to reveal these skills and knowledge to the rest of the world. The successive Boards of AfrEA have worked to developing the concept. AfrEA hopes that during in the next couple of years a strong, precise and concise literature of the matter will be brought to mainstream evaluative thinking on the continent, and also to share with our colleagues from other parts of the world.

Strengthening AfrEA’s own institutional capacity to be able to deliver on the three issues identified above

AfrEA will deliver on the above issues if the organization has the necessary capacities to do so. These capacities encompass:

- Human resources through necessary staff to support the elected Board;
- A strong and reliable virtual network and channels of communications that properly operate and reach out to existing and new members (an updated website, a moderated AfrEA listserv, systematic communication with the membership base);
- Enhancing technical expertise of AfrEA Board members, individual members and national associations to enable them to support and provide technical assistance and expertise to national and local governments, parliamentarians, and civil society;
- Liaising AfrEA with continental, regional developmental institutions; liaising national associations with their respective governments as well as with regional institutions;
- Funding and supporting AfrEA’s strategic plan.

Bottlenecks and challenges

Prior to the formation of AfrEA there was an absence of an interlocutor promoting the evaluation profession at the continental level. However, as a continental evaluation body AfrEA does not have any formal relationship with the African Union or any regional body such as ECOWAS, CEMAC or SADC. There is a limit for AfrEA's capacity to really influence evaluation policies at the regional or continental level. This is partly due to the shortage of human resources. Since its creation AfrEA has constantly been run by volunteers. It was only in 2009 that a more complete Board of eight persons was elected. Though with the new democratic tendency AfrEA has a larger Board, these Board members remain volunteers who have their own primary jobs and workload to carry on. This situation is really hampering AfrEA's effort in contributing to Evaluation Capacity Development on the continent.

There has been in the past an insufficient tertiary education and trainings on evaluation on the continent. This gap has been filled now for a few years by some universities in South Africa offering post-graduate degrees in evaluation whilst in other countries universities and institutes have taught masters-level courses in different fields with specific modules on evaluation. The ECD framework encompasses both the demand and supply side. The supply side can only occur if we have well trained evaluators. Unfortunately on the continent most evaluators have acquired their skills in evaluation either through short length workshops, self-training or through other disciplines. AfrEA believes that in the future a tertiary level education in evaluation should combine professional development workshops with short length trainings in evaluation and internships which would greatly contribute to the development of Professional Evaluation on the continent.

A current challenge AfrEA is experiencing is the transition from a virtually based network to a formally and physically structured organization with a permanent Secretariat and organizational capacity to run and deliver on programs. With a permanent Secretariat based in Accra since 2009, it has reduced the workload on the volunteers of the Board. Nonetheless, AfrEA's leadership should think strategically on the business model that will enable the network to continue reaching out to the wider community of evaluators virtually, while building up its managerial structure that delivers on concrete outputs.

Further, the diversity and the inter-disciplinary professional nature of the AfrEA members' network, whether they are paid or non-paid members, is a unique asset and a point of strength that must be sustained and further nurtured. Consequently, AfrEA's new business model should be able to create the appropriate channels for members to voice their contribution, establish links and exchange among themselves. The current technology and web-based applications are conducive for this type of exchange to be further expanded (the AfrEA listserv, portal e-discussions, blogs, Twitter, etc.).

Progress and results

The creation of national VOPEs. Since its creation in 1999, AfrEA has supported the creation of national VOPEs. From six VOPEs in the 90's, AfrEA now counts around 20 national VOPEs that are due members of the organization. The fact that all these national VOPEs in turn have contributed to individual members' capacity building and, in many cases, also to the support of elaboration of evaluation policies, is considered as great achievements of AfrEA. The locations and contact information for VOPEs in Africa can be seen on the AfrEA website www.afrea.org and visibly be seen on the interactive map on the www.ioce.net website.

Organization of biennial conferences. Every two years AfrEA organizes a biennial conference gathering evaluators from Africa and outside Africa. These conferences are attended by people interested in evaluation, coming together from all sectors – government, donors, academia, NGOs, consultants, etc. – from many countries within and beyond Africa. The level of experience of these participants range from experts/senior evaluators to junior evaluators. African participants have made paper presentations, poster presentations, panels as well as facilitating professional development workshops during these conferences. They have also been in contact and shared their experience and knowledge in evaluation with evaluators from around the world. AfrEA's conferences have seen the participation of well-known international evaluators such as Michael Quinn Patton (Utilization Focus Evaluation, Developmental Evaluation), Jim Rugh (RealWorld Evaluation), Jennifer Greene, Mel Mark, Elliot Stern, Penny Hawkins, Nancy MacPherson, Ray Rist, Nancy Porteous, and others. During recent years AfrEA conferences have generally gathered between 500 and 700 people from roughly 60 countries around the world ranging from Africa, Europe, North America, Asia and Oceania.

The active and dynamic listserv. As an experience-sharing and mentoring tool for evaluators within the continent, the listserv has contributed to sharing of evaluation tools, methodologies, discussions on evaluation approaches and paradigms, members' requests for peer assistance, effective assistance and guidance of members. The listserv is also a medium of communication for M&E job opportunities. The listserv, created in 2002, currently has around 600 members. For almost five years it was managed by a Secretariat located at EvalNet in South Africa.

The website (www.afrea.org) has been developed, revamped and updated. Among others it contains the list of national evaluation associations, evaluation resources, and AfrEA's history and mission. Further, the AfrEA e-newsletter is a tool for sharing of experience and information for evaluators within the continent. Launched in 2009, the e-newsletter has been issued not during AfrEA biannual conferences and on average of twice yearly.

International representation. As mentioned above, evaluators from other parts of the world have been attending AfrEA's conferences since 1999. In turn AfrEA, through its official executive or individual members, participated in conferences of sister evaluation organizations. AfrEA's representation has always been valued through paper presentations, panel discussions or professional workshop facilitation. With the support of its various partners (e.g. AEA, EES, CES), AfrEA has raised funds to provide scholarships to its individual members to attend such conferences.

In addition to the conferences, AfrEA has been represented in international fora, including those of IOCE since its creation in Peru, NONIE and the OECD-DAC Evaluation Network. AfrEA members in these international professional gatherings or organizations have held key functions' such as: Vice-President of the Inaugural Board of IOCE and of the first NONIE Steering Committee (Zenda Ofir), President of IOCE (Oumoul Ba Tall), President of IDEAS (Sulley Gariba), Secretariat of IOCE (Nermine Wally), Members of IOCE Board (Simon Kisira & Issaka Herman Traore), and members of the EvalPartners Management Group (Issaka Herman Traore & Nermine Wally). These representations have brought AfrEA's voice to the international evaluation community, thereby creating an exchange and sharing medium between AfrEA and its sister evaluation associations/societies around the world.

Leaders of national networks brainstorming meeting. Right from the first conference a tradition was developed within AfrEA

which is to organize a meeting and brainstorming of leaders of national VOPEs. These were special opportunities where a face-to-face meeting and experience sharing among leaders of national VOPEs were taking place. Though the internet nowadays constitutes the main medium of communication, a face-to-face meeting tends to bear more fruit than a virtual discussion. These meetings have been channels through which the African Evaluation Guidelines were revised.

Key enabling factors

The passion and enthusiasm of successive leaders. Prior to the Cairo conference in 2009, AfrEA was led by individual volunteers who successfully ran the organization. The enthusiasm and passion of these pioneers have been passed on to their respective successors. After thirteen (13) years of existence one needs to acknowledge the contribution of this enthusiasm and passion to the continuous growth and respectability of AfrEA within the continent and beyond. A special mention to AfrEA pioneers: Mahesh Patel, Jean Charles Rouge, Zenda Ofir, Oumoul Ba Tall, Sulley Gariba, and the recent elected Board members led first by Florence Etta and now by Nermine Wally. The passion of all these persons, their commitment to evaluation and Africa has greatly contributed to bringing AfrEA to the level of a shining star in the sky of worldwide evaluation.

Partnership and sponsors. AfrEA has been successful in its activities with the commitment of its leaders and members as mentioned above. However, this commitment alone would not have been enough without the support and solidarity of Friends of AfrEA. These Friends are bilateral institutions (embassies), multilateral institutions (World Bank, UN Institutions – especially UNICEF, African Development Bank, *Organisation Internationale de la Francophonie (OIF)*, the European Union, etc.), African Governments (Kenya, South Africa, Niger and Ghana), Development agencies, INGOs and Foundations (CRS, CARE, Rockefeller Foundation, Bill & Melinda Gates Foundation etc.).

Strategic planning and organizational strengthening. In 2010, with the support of the Rockefeller Foundation, AfrEA developed a holistic strategic plan that encompasses Evaluation Capacity Development, Membership Development, AfrEA's Institutional Capacity Development, Governance Policy, Advocacy and Communication. This five-year strategic plan is a cornerstone for future AfrEA

growth on which the successive leadership and AfrEA's friends can rely for the promotion of professional evaluation on the continent³.

Beyond the elaboration of the strategic plan, this grant has facilitated the recruitment of a permanent Project Manager serving AfrEA staff at its Headquarters within the University of Ghana in Accra. Further, the Bill and Melinda Gates Foundation committed to support the Institutional Strengthening of AfrEA in the framework of support by the Foundation to grantees to design and implement high caliber evaluations across African continent, especially the Agricultural Development anchor countries. This type of support will definitely 1) better capitalize on the engagement of the volunteer Board, 2) operationalize AfrEA strategic objectives, and 3) situate AfrEA as strategic continental body.

Innovations and lessons learned

Innovations

Joint Partnerships. Until 2011 all AfrEA trainings were conducted through professional development workshops during the biennial conferences. In 2010 AfrEA established a joint partnership with two well-known universities – The Centre for Development Innovation at the University of Wageningen (Netherlands) and *Institut Supérieur des Sciences* de la Population at the University of Ouagadougou (Burkina Faso). This innovation in evaluation training has enabled the technical skills of more than fifty evaluators through an eleven-days training with a Certificate delivered to the participants. The feedback from participants and the two universities is very encouraging. The University of Ouagadougou, for instance, wants AfrEA to continue the partnership after the three years project. This training is also innovating due to the language of the training: it is a course taught in French, for Francophone African evaluators primarily in West Africa, though participants from Central Africa have also attended the training since the beginning in October 2011. This proves that this initiative of AfrEA is really filling a gap based on existing needs.

Development of an Africa “rooted”⁴ Evaluation Capacity Development Project. In 2010 the Board of AfrEA designed an

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- 3 Following the election of its Board in 2009 at the Cairo conference, AfrEA received a support of the Rockefeller Foundation as institutional capacity development assistance (2009-2011). The Bill and Melinda Gates Foundation also committed to support AfrEA Organizational Strengthening for 3 years (2012-2015).
 - 4 An Africa-rooted approach will take into account the African context, and the indigenous knowledge on evaluation methods, data analysis and dissemination.

ambitious Evaluation Capacity Development Proposal which has the following main components: partnership/twinning with universities outside of Africa to train African evaluators for advanced degrees (Master & PhD); identification and partnership with universities/training institutes in Africa to launch degree programs in Evaluation (Master & PhD); and the stimulation and promotion of an African School of Evaluation based on African know-how, knowledge and skills in evaluation using languages, paradigms and indigenous research concepts (Made in Africa Approach to Evaluation). The initiative of African-rooted evaluation research award/competitions is aimed to encourage academics and evaluation professionals to carry out research on evaluation and evaluative research on indigenous theories and knowledge of evaluation in Africa. The recent African Thought Leadership Forum on Evaluation and Development held in Bellagio, Italy (see below) as a step in this direction.

The African Journal of Evaluation (AfrJE)⁵. The Journal was conceptualized in 2007 during the Niamey conference and is part of AfrEA's comprehensive efforts geared towards a "Made in Africa approach to evaluation". The Journal aims at strengthening the evaluation capacity in the continent by providing a platform for the African community to document emerging evaluation theories and practices; providing an opportunity for cross-fertilization of ideas and methodologies across disciplines; providing a vehicle to develop African evaluation scholarly research, as well as field/action oriented research relevant to the continent's development context, authorship as well as promoting a culture of peer-review. The Journal is expected to engage with several partners from the continent to contribute to its different editions; national and regional VOPEs, universities, think tanks and research centres, etc.

EvalMentors. The initiative aims at providing opportunities for young and junior professionals to gain practical evaluation skills and experience in the continent. It aims at supporting development that is anchored in evidence, learning, and mutual accountability to bridge the gap between the supply and demand for evaluation in the continent. Current efforts on this by AfrEA include *EvalMentors*, implemented as part of the EvalPartners Initiative, launched by AfrEA in partnership with the Canadian Evaluation Society (CES) and Société québécoise d'évaluation de programmes (SQEP). EvalMentors provides support and mentoring to emerging African national VOPEs, as well as emerging publishers, and professionals through peer to peer support.

5 To distinguish it from the American Journal of Evaluation (AJE) the acronym might be AfrJE, or the name changed to Journal of African Evaluation (JAE).

EvalMentors is a pilot initiative that targets emerging and nascent VOPEs in Africa, with the aim to provide institutional and organizational support for VOPEs to deepen their engagement with national evaluations and achieve their overall mission. EvalMentors is conceptualized as partnership between AfrEA, SQEP and CES and is implemented under the umbrella of EvalPartners. The partnership between the three evaluation networks builds on the existing expertise and the institutional know-how of these respective institutions to provide institutional back-up and strategic advice to nascent and emerging VOPEs to exist and pursue their mission at the national level. Forms of support include but will not be limited to seed funds to support operational and functional activities essential for the good functioning of VOPEs, mentoring support to formulate strategic directions and work plans, institutional advice on governance and institutional structure for the good functioning of VOPEs.

The African Thought Leadership on Development and Evaluation. As noted above, this forum has been jointly launched by AfrEA and the CLEAR initiative, South Africa, hosted in November 2012 in the Rockefeller Bellagio Center, in Italy. The forum is a response to the urgent need for innovation in African evaluation through thought and practice leadership. This was reinforced in a statement released by the last plenary session of the Fourth AfrEA conference held in Niger in 2007 and reiterated in the 6th AfrEA conference held in Accra in 2012. The forum brought together a small group of 19 carefully selected thought leaders from Africa from a range of disciplines, policy field, science, development, evaluation, social sciences and arts. The goal of the ongoing forum is to give impetus to efforts to strengthen the leadership and accelerate the evolution of the field of evaluation in Africa; to (i) serve the development of the continent in the best possible way over the next decade; and (ii) inform and support evaluation theory and practice worldwide. One of the immediate follow-up activities of the forum is envisaged to be the formulation of a “green paper” that frames and situates evaluation theory and practice with regard to development interface in Africa, and a better articulation on the aforementioned agenda on the “Made in Africa Approach to Evaluation”.

Lessons learned

After thirteen years of existence made by administratively running AfrEA, partnership, organizing conferences and international representation, it is time as evaluators to look into the mirrors to see an estimate of the miles traveled and how we reached where we

are today. First of all the formal registration of AfrEA in Ghana is an important step to consider and mention in the life of our organization. This registration gives a legal entity and authority to AfrEA to act and represent its members (individuals/national associations and organizations/institutions).

The process of designation of the leaders (Board Members) has moved from a co-optation/volunteering function at the beginning of AfrEA to a more democratic election process. Between the 2009 conference in Cairo and the 2012 conference in Accra, the democratic election process of the Board has taught us the necessity of having an electoral system known by all AfrEA members. The innovation of electing one representative from each region within the Board that was introduced during the Accra conference will certainly permit a fair geographical representation within the Board.

Regarding the ECD framework, AfrEA as a continental organization has little chance to influence Evaluation Policies at the continental level due to the lack of an African Continental Government. Nevertheless the existence of the African Peer Review Mechanism under NEPAD is an opportunity for AfrEA to partner with the African Union to promote professional evaluation on the continent. Maybe the best way to bring our expertise to the African Union will be for AfrEA to have a status of Observer at the African Union.

It's known that big ideas do not become concrete actions just by the will of their authors. These ideas need to be supported by means of implementation. In AfrEA's case the lesson learnt during the past thirteen years is that without a sustainable funding scheme most of our projects will remain at the level of mere thoughts without any possibility of implementation.

Last but not least the continuity that guides the life of governments and administration all over the world should guide AfrEA's life. The successive leaders/Boards should build on the outcomes of the work achieved by their predecessors. It is only through that mechanism that we will really live up to our profession. As evaluators, we should also learn to evaluate ourselves in the way we run our organizations. This auto-evaluation will help us learn from our mistakes and errors built on them for the future.

Next steps

AfrEA institutional set-up. AfrEA has experienced a number of organizational and governance changes. Throughout the past three

years particularly, AfrEA has been struggling in situating its organizational identity. With a permanent Secretariat based in Accra since 2009, an Office Manager and a number of programs being implemented in addition to the biannual conference, AfrEA has witnessed the increased pull toward becoming a fully functional physical organization with a proper staff and management structure to carry out AfrEA's activities and financial matters. Like all membership-based organizations, AfrEA's management should think strategically on how to ensure that the physical and financial growth of AfrEA does not hinder the virtual nature of the network and the organic structure where individuals are engaged and constitute the core of AfrEA dynamism and activism.

For example, the AfrEA listserv comprises over 600 members who are African and international evaluators, development practitioners, government officials, sectoral experts and researchers, resources partners, academics, students as well as young professionals interested by the evaluation discipline. The diversity and the inter-disciplinary nature of the AfrEA network, which includes paid or non-paid members, is a unique asset and a strength factor that should be sustained and further nurtured if AfrEA is to invest in its formal organizational expansion. Further, it is essential to provide appropriate channels where members of the network have spaces for their intellectual contributions, and structure the channels in a way to create pressure/incite members to take actions and organize action. The current technology and web based applications are conducive to the development and expansion of the network and interaction between a wide range of members of the network (notably the AfrEA listserv, portal e-discussions, Twitter, etc.).

With generous support from prominent foundations towards AfrEA's institutional growth, AfrEA's leadership is increasingly required to think strategically of the right business model that takes into careful consideration the strengthening of existing voice channels and creating the appropriate structure for organized actions by members.

Implementation of the Strategic Plan. Several meetings and discussions have been held on several important issues pertaining to evaluation development and professionalization on the continent since AfrEA's creation in 1999. The 2010 AfrEA Strategic Plan summarizes all these thoughts and ideas thereby taking into consideration some innovations.

The next steps require AfrEA to move beyond ideas, concepts and theoretical paradigms to make Innovative Evaluation alive on the

continent for more professional evaluation and a better life of African peoples, on behalf of whom all development programs/projects are designed and funded:

- The acquisition of funds to implement this Strategic Plan will contribute in enhancing AfrEA's capacities at the institutional level and make the organization stronger.
- The membership development policy implementation will increase the number of AfrEA members thereby contributing to its financial sustainability through payment of membership fees.
- Advocacy and lobbying of development agencies, regional and continental institutions, will make AfrEA more visible and known, as well as promoting the African Evaluation Guidelines with those who are regularly commissioning evaluations on the continent.
- AfrEA's Evaluation Capacity Development scheme will contribute both to the development of capacities of individual evaluators as well as capacities of institutions (universities/training Institutes).
- The Made in Africa approach to evaluation that is also part of the Strategic Plan will create the roots and basis for an African School of Thought on Evaluation. Such a School of Thought will bring Africa's contribution to the theoretical and practical development of our Profession.
- Revising, situating and advocating for the use of the African Evaluation Guidelines by evaluators and evaluation commissioners through a process of consultation with the member VOPEs.
- Finally in addition to the above mentioned initiatives and projects, AfrEA, in collaboration with its partners within IOCE, is looking forward the effective implementation of EvalPartners and EvalMentors that will also contribute to the development of country-level evaluation policies, the development of the capacities of national VOPEs, as well as evaluative capacities of individual members.

AUSTRALASIAN EVALUATION SOCIETY (AES)

THREE DECADES OF STRENGTHENING EVALUATION CAPACITY IN AUSTRALASIA (1982-2012)

Anne Markiewicz

AES Vice President

Maria Eliadis

AES Executive Officer

Dorothy Lucks

*Member of AES Strategic Engagement
and Professional Development Committees*

Background

Introduction to the Australasian Evaluation Society

The Australasian Evaluation Society (AES) was established to inspire evaluation practitioners with a firm foundation for continuous improvement in evaluation theory and practice across Australasia. The Society officially commenced in 1987 and now has twenty-five years of experience in supporting its membership. The AES is now the primary Australasian professional organisation for evaluation practitioners, managers, teachers and students of evaluation, and other interested individuals.

The driving force of the AES is to improve the theory, practice and use of evaluation through:

1. establishing and promoting ethics and standards in evaluation practice as a service to the community of evaluators and users of evaluations;
2. encouraging advances in the theory and practice of evaluation by publishing such advances and by recognising outstanding contributions;

3. providing education and training in matters related to evaluation;
4. providing forums for networking and the discussion of ideas including society publications, seminars, workshops and conferences;
5. acting as an advocate for evaluation and encouraging understanding about the use and application of evaluation;
6. linking members who have similar evaluation interests; and
7. other activities consistent with this aim.

The AES started with a membership of 140 and currently has over 1000 members involved in all aspects of evaluation. Members meet regularly through Regional Groups centred in major cities in Australia and New Zealand.

History of the AES

The AES started through the process of a series of National Evaluation Conferences in Australia. The initial conferences were heavily supported by both academic and government evaluation professionals. The conferences provided a venue for evaluation practitioners to meet and exchange views. Over the years, leaders in the sector made contact and recognised the need for practitioners to share views and assist in developing the evaluation skills and professional recognition. The AES has evolved from a small networking group, informally sharing knowledge and experience into a formal organisation with a national and regional profile, technical credibility, providing professional services to members. The following paragraphs provide a brief profile of the key people who influenced the development process of the AES and the steps that have been taken to bring AES to its current level of organisation.

Founding members and Fellows

The AES emerged from the work of the current AES Fellows and other eminent evaluation practitioners. Dr Elaine Martin, of Flinders University, School of Social Administration and Social Work, is acknowledged as a founding influence through her leadership in evaluation theory and practice in social welfare. The founding fellows were recognised in 2003 and include:

- Anona Armstrong, PhD, Grad Dip Pub Pol, BA (HONS), Founding AES President in 1986, Company Directors Diploma, Professor of Governance, Victoria Law School (Victoria) and Member of the Order of Australia in 2008.

- John Owen, BSc (Hons), MEd, PhD, Associate Professor, Centre for Program Evaluation, University of Melbourne.
- Sue Funnell, BA, MA. AES Awards Chair 1993-1997. A key contributor to use of program logic approaches and providing policy support to the NSW Government.
- Chris Milne, BA (Hons), DipEd, MA, (NSW), AES Inaugural Chair of Ethics Committee.
- Colin Sharp, Associate Professor of Management, Flinders Institute of Public Policy and Management, Flinders University
- Ian Trotman, New Zealand AES representative, substantial contribution to AES constitution and Ethics and Standards Committee.

In later years, the work of additional Fellows has been recognised as they have assisted AES in its development. The AES Fellows retain an active role in promoting the AES and advocating on its behalf. The high achievements of the Fellows allow them to act as mentors to other members and guidance to the AES on matters related to the field of evaluation.

Evolution of the AES Structure and Operations

1982-1992: The initial AES structure was an Executive Committee comprising three office bearers and a general membership. From the early 90's membership grew and there was wider involvement in AES activities. In 1992, a Strategic Working Party on the future of the AES prepared a corporate plan "AES 2000: Leading the Society into the Future." During the planning process, options for future directions were discussed, including being a broad interest group, a learned society or a chartered professional institution. The Committee decided that AES would provide most benefit to its members and the sector by being a learned society.

1992-2002: The AES 2000 plan positioned AES as a broker between "doers" and "supporters" of evaluation and the objectives as described above were formulated. The corporate plan was used to develop a new constitution and it was proposed that AES finances should cover appointment of part time staff to improve services. In 1993, the Committee decided to reconstitute under the Australian Capital Territory Association Incorporated Act that would provide a better legal framework and limited liability than the previous Club registration.

The structure of the Board was adjusted to provide greater membership and skills representation. Key structures included: a Board of four office bearers, regional representatives and 5 elected general members with a balance of skills. The Board was required to have a minimum of three meetings per year. By 1995, the Board was again considering the future of AES and a Strategic Planning Committee was established. The Strategic Plan: "AES Leading Evaluation Theory, Practice and Use into the 21st Century."

The Strategic Plan influenced the next stage of AES development as more members joined and the breadth of activities increased. In 1994, the new Constitution set up a more manageable federation of regions with a head office support. A centralised financing model was established but with capability for regions to prepare business cases for non-routine projects. A few regions were partially funded through other organisations or by sponsors. The Constitution also ensured equitable regional representation on the Executive Committee and the Board.

By 1999, an increase in the number of regions and greater complexity of AES business increased the scope and responsibilities of the Board. This resulted in longer meetings and higher costs. Consequently, the structure was modified to a larger Executive Committee to handle day to day management. The Committee reported to the Board three times per year to enable the Board to set strategy, monitor progress and generate the required material for the Annual Report and Annual General Meeting.

2002-2012: The operation of the Board is governed by the AES Constitution that was adopted in September 2009. The AES Constitution outlines the basic operational policies and guidelines for AES, particularly in relation to membership and good governance. This was followed by development of an AES Ten Year Strategy 2010-2020 and an Operational Plan for 2011-2013. The new Strategic Plan articulated the AES vision and mission as:

Vision: "To be the pre-eminent voice and leader of evaluation in Australasia"

Mission: "To see rigorous evaluation as central to policy development, program design and service delivery"

The AES Strategy and Operational Plan are now overseen by an eight member Board and a suite of operational Committees and specific Working Groups. The Committees and Working Groups encompass:

- Membership Services and Governance
- Conference Organising
- Finance and Audit
- Ethical and Professional Practice
- Indigenous Strategy
- Professional Learning
- Strategic Engagement
- Marketing
- Evaluation Journal
- Awards and Recognition

Each Committee and Working Group operates according to the *AES Committees and Working Groups Terms of Reference* (draft) 2012. This approach is designed to increase the membership engagement within AES, harness the skills of leaders within AES and provide a cost-effective model of operation.

Regional Activity

Regional activity is the heart of the AES. The regional activities are the focus of personal contacts and mutual support. Activities range from delivery of a program of seminars and discussion forums to semi-social meetings associated with lunch or dinner. In the early years there was no formal provision for regions. The eastern Australian regions were most active but were quickly followed by New Zealand, South and West Australia. Activity has fluctuated in Tasmania and recently has grown in the Northern Territory. New Zealand grew from one region to three; then with government restructuring reverted to two groups. The AES now comprises ten local and regional branches: two in New Zealand and eight in Australia:

<i>New Zealand</i>	<i>Australia</i>	
Auckland	Victoria	New South Wales
Wellington	Queensland	Northern Territory
	Western Australia	South Australia
	Canberra	Tasmania

Operation of the regional branches and the local program of activi-

ties are dependent upon local leadership and volunteers. To date the regions have rotated the intensive task of organising and supporting the AES annual conference.

Annual international conferences

The Annual Conference has been, and continues to be, a flagship activity of the AES. The first was conducted in Melbourne during 1982; five years before the AES was formally established. The first Conference attracted 90 evaluation practitioners. Anona Armstrong was Organising Committee Chair and her influence contributed to establishment of the AES, with her taking the role of the first Chair of AES.

The networks formed through the first two conferences cemented professional links between leading professionals in Australia and New Zealand. In 1986, the Conference moved inter-state and was held in Sydney. Since that time, the Conference has rotated through the regions and numbers attending have increased to an average of around 350-400 participants. The Annual Conferences are now a proven forum for learning and networking. The AGM and Board meetings have generally coincided with the Conference. The AES Professional Awards presentations are now also incorporated into the Conference proceedings at the Conference dinner, supporting excellence in evaluation practice.

Evaluation Journal of Australasia

Prior to establishment of the AES, in the period from 1977-84, an evaluation newsletter was edited by Jerome Winston. Soon after establishment of the AES, plans for an AES newsletter were discussed as a means to showcase AES, its professionalism and membership. The Bulletin of the AES was launched in 1987 under Barry Bannister. This evolved to the Evaluation Journal of Australasia (EJA) with major components of: refereed articles, reflections on practice and book reviews. It was seen as a vehicle for academics and experienced evaluators to communicate information. Two issues were produced annually.

In the early 90s a series of "How to" booklets was proposed with thoughts of a wider market but they did not eventuate due to lack of resources. In 1992, Darrel Caulley launched the Evaluation News & Comments (EN&C) to meet the needs of members particularly outside state capitals. Originally three issues per year were intended. Financial constraints reduced publication to two issues per year alternating with the EJA. The number of pages sometimes fluctu-

ated with available funds.

In the mid-90s the EJA faltered mainly due to insufficient resources and to insufficiently polished contributions. Several issues were cancelled rather than release material that was not to a sufficient standard. However, by 2000, the Journal and magazine were merged into a new EJA and more recently, the online E-news.

Maintaining the momentum of current publication commitments through regular production of EJA and E-News is now a priority of the AES. Articles continue to be submitted across an increasing range of topic areas related to evaluation, and submission of manuscripts from overseas authors is growing. Members are encouraged to submit manuscripts to the journal as this is considered a vital source of professional peer review and knowledge dissemination about current issues and approaches to evaluation.

Strategy and implementation

Strengthening an Enabling Environment

AES is contributing to improving evaluation standards, professional knowledge and experience across Australia and New Zealand. The generation of the AES *Guidelines for the Ethical Conduct of Evaluations* (1997) was an important milestone for AES. The Guidelines were generated through consultation with the regional groups and a summarised *Code of Ethics* was endorsed by the Board in December 2000. New members receive a copy as they join and are required to sign their acceptance to abide by the Code. This initiative is instrumental in improving the standards of Evaluation and strengthening the credibility of AES members. It has also been marketed throughout the region and internationally with other Evaluation Societies to assist in their development of similar standards.

In addition, AES supports evaluation in the public sector through the work of its membership:

- 38% of AES members work for the public sector in either Australia or New Zealand
- 36% work in consultancy and the majority are regularly engaged with government assignments.
- 12% work in the not-for-profit sector and are regularly required to report to government on the outcomes of government funded projects.

- Many of 12% of the AES membership in academia are directly engaged in research and evaluation projects focused on government policy and programs.

The role of AES members who have worked in the public sector has been important in strengthening the enabling environment. There have been prominent AES members such as Marion Amies (AES Awards Chair 1997-1999) and Keith McKay who promoted evaluation practice within the Department of Finance, Brian English in the Office of the Premier and Cabinet in Western Australia and Darren Harris who prepared evaluation policy/guidelines for the Department of Human Services in Victoria. Integrating evaluation processes and procedures within government has promoted the value of evaluation in improving program quality and increased the program standards for government and not for profit service providers.

The AES conference where evaluation policy issues and opportunities are presented and discussed is well-attended by government representatives and this provides a forum for networking between the government attendees and other evaluation practitioners. In New Zealand, there has been a particular focus on good evaluation practice in relation to cross cultural issues and this is strengthening the application of such practice in a range of public programs.

In recent years, the AES has increasingly turned its focus towards policy advocacy. One example is the AES's recent submission to the Australian Government Department of Finance and Deregulation's draft Commonwealth Financial Accountability Review (CFAR) 2010. The objective of CFAR is to improve performance, accountability and risk management across government. The AES submission highlighted the work of the AES and its role in strengthening accountability for public investments. The AES' Strategic Engagement Committee will work to further advance evaluation in the external environment in both domestic and international development spheres.

The AES supports an active workshop and professional development program. It has attracted sector experts to Australasia, such as Terry Smutylo to provide training on Outcome Mapping in late 2011. The AES has formed an effective partnership with the Centre for Program Evaluation (CPE) at the University of Melbourne where the AES office is based. Further opportunities for collaboration between the AES and the CPE will be forged over forthcoming years.

The AES is also providing capacity building support to the emerging Papua New Guinea (PNG) Association of Professional Evaluators (AoPE). Further across Australasia and in the global forum for improving evaluation practise, AES provides support via individual members to the International Organisation for Cooperation in Evaluation (IOCE), Network of Networks for Impact Evaluation (NONIE), International Program for Development Evaluation Training (IPDET), and the Shanghai International Program for Development Evaluation Training (SHIPDET). The resources and expertise available through AES and its activities provide a base, tools and a professional support network that underpins region-wide activity in evaluation.

Enhancing individual capacities

AES emerged from a strong demand across Australasia to strengthening evaluation capacity amongst practitioners. AES has gradually developed clear strategies and mechanisms to support evaluation capacity development for a range of practitioners. The main avenues for capacity development are the AES annual conference and the professional development program. The conference generally has a pre-program of workshops covering a wide range of topics. These are well attended and evaluations indicate a high level of appreciation of the professional and skill development opportunities. The EJA also provides opportunities for both members and non-members to extend their knowledge of different aspects, application and innovations in evaluation.

Over time, AES has been able to strengthen its support by offering opportunities for visiting trainers to travel around the regions, conducting seminars and workshops. In the late 1990s, the AES Awards were introduced. These were designed to encourage and recognize excellence in evaluation and provide role models for the sector. The role of the awards has increased over the years in line with scope and profile of the sector. The conference, awards and seminars have also been a means to strengthen relationships with individuals in emerging evaluation societies across Australasia.

Strengthening equity-focused evaluation systems and evaluations

AES has instituted Special Interest Groups (SIG's) as a vehicle through which to progress particular areas of interest and manage the development of the knowledge and practice in these areas. The AES currently has four operational SIG's: the Indigenous Evaluation SIG, the Realist Evaluation and Realist Synthesis SIG, the Perfor-

mance Measurement SIG and the Eval Tech SIG. The AES aims to encourage and support the establishment of more SIGs.

The development of Indigenous evaluation is a priority for the AES. An AES Indigenous strategy supports the aims of: increasing the numbers of Indigenous people in evaluation; strengthening the capacity of evaluators to produce high quality, ethical work in Indigenous contexts; and, increasing knowledge, skills and competence of Indigenous and non-Indigenous evaluators.

Key initiatives in this area include:

- support grants for Indigenous evaluators to participate in the annual conference and workshops program;
- developing a registry of Indigenous researchers and exploring mentoring/training pathways and promoting partnerships between the AES and Indigenous organisations, people, groups and people;
- Regional groups have conducted a range of seminars and workshops focussed on Indigenous programs and on conducting responsive evaluation in Indigenous contexts. Nan Wehipeihana and Kate McKegg conducted workshops across Australia on developmental evaluation, which drew heavily on their experiences with Maori community development programs.

Bottlenecks and challenges

Over three decades of operation AES has faced a range of different challenges. The three challenges that have posed the greatest difficulty in building AES's capacity have been:

Building financial momentum and governance capacity

Initially, the AES worked largely on the contribution of volunteers and with government support. In the mid-1990s, government support reduced and AES turned to private sector conference organizers. There has been tension over the years in how AES should position the conference, with some favouring lower fees and more modest arrangements and others preferring a more professional profile and a bigger profit margin for the event entailing higher fees. The conferences have been run on a for-profit basis, but not all conferences have operated at a profit due to different reasons. AES has had to learn from experience in designing and managing the conference to ensure that an appropriate margin is generated.

Similar discussions have been generated over setting of membership fees. AES has had to consider setting fees that provide value for the members whilst allowing the organisation to remain viable. The AES has not always been able to afford dedicated administration staff. This has hindered the ability of AES to operate as effectively as the leadership and membership wished. Although the contribution of volunteers has been invaluable, the fragmented nature of governance resulted in difficulties in maintaining operations. As the membership has grown, and fees have kept pace with the market and demand of members, the organisation is now in a better position to cover the costs for management and administration. The AES appointed its first Executive Officer (EO) in mid-2011 which has raised the capacity of the AES to deliver on its Strategic Plan.

The intention is that both the AES annual conference and the workshop program, together with annual membership fees, provide an adequate basis to support the range of services the AES intends to provide in alignment with its Strategic Plan. This will require effective business planning and monitoring income generated against expenditure. The intended goal is to reach a balanced budget where the AES can support its strategic directions and a staffed office. This has brought a new level of organisation and efficiency that will assist AES growth in future.

The disperse geographical spread of operations

The AES currently spreads over two main countries with eight regions in Australia and two in New Zealand. Establishing effective modes of communication and operation across this wide geographical spread has been a challenge. There has been difficulty in establishing an effective means of instilling sound practices in each region, whilst allowing sufficient autonomy and flexibility to suit the differing needs of each region.

Over the years, a model has emerged that supports regions to develop their own program of activities through an annual planning process. However, accountability is required in line with the overall AES strategic directions, operational plan and budget process. The AES consistently reviews its own progress and procedures and is gradually improving its capability to address the needs of its membership across all (and future) locations. The newly developed governance structure of the AES that marks out roles and responsibilities of the Board, the Executive Officer, the newly formed Committees of the Board and the regions should assist the process of improving communication.

Building an online presence

AES identified in 1996 that it should have an online presence. Initially a website was hosted by the supplier of AES administration services at no cost. Over time, as a more complex site was envisaged, AES needed to take a forward-looking approach that would minimize costs and ensure that AES generates the required revenue for its operations. This has required AES to invest time and resources in ensuring sound policies for use of technology, rights for sale of sponsorship, editorial control, and structure a site to allow for future development. The AES has recently updated its website (www.aes.asn.au) to keep its profile and activities relevant and in line with technological advances. The new website will provide an interface between the AES its membership and the broader sector, as well as streamline operations.

Progress and results

The AES has achieved steady growth and progress over its 25 years of operation. The progress is demonstrated by its increasing membership and influence. There are six clear indicators that demonstrate that AES is achieving progress in line with its Constitution. These are:

	<i>Objective</i>	<i>Results</i>
1.	Establishing and promoting ethics and standards in evaluation practice	Publication of AES Code of Ethics and Guidelines Regular review to update Code of Ethics
2.	Encouraging advances in the theory and practice of evaluation by publishing such advances and by recognising outstanding contributions	Regular publishing of Journal since 1990s Annual Awards for Excellence in Evaluation in a range of categories
3.	Providing education and training in matters related to evaluation	Annual program of workshops and seminars in each region and at the Annual Conference

	<i>Objective</i>	<i>Results</i>
4.	Providing forums for networking and the discussion of ideas including society publications, seminars, workshops and conferences	Supporting regions in local activities and program of events which generally take place on a monthly basis Increasing opportunities for networking at Conference.
5.	Acting as an advocate for evaluation and encouraging understanding about the use and application of evaluation	Advocacy activities undertaken with Commonwealth and State/Territory Government departments, the no-for-profit sector and the Higher Education Sector
6.	Linking members who have similar evaluation interests	Increase in membership from 140 to over 1,000. Online register of evaluation consultants, evaluation annual awards to increase profile of members Establishment of committee structure to involve a wider group of AES members in strategic areas

Key enabling factors

There are three main factors that have consistently contributed to the AES capability to deliver results. These are: (i) vision, leadership and involvement; (ii) recognition of professional expectation (a market-led approach) and building critical mass; and (iii) sound governance principles and practice.

Vision and leadership

The AES would not exist nor have accomplished its achievements without the vision of a number of dedicated leaders. In particular, the AES Fellows, successive Board members and committee and regional chairs have demonstrated the ability to embrace a collective vision, providing their own vision for different aspects of the organisation. The AES leaders have been able to communicate their vision so that other members have been able to embrace it and together strive to implement it. AES members offer many hours of their time to undertake the work of the AES. From executive duties on the Board, to regions organizing and seminars and networking events, to the production of the Journal and organization of the annual conference; the high level of volunteerism is critical to the

success of AES. The development of a Strategic Plan for a 10 year period 2010-2020 has provided a vision to the future. The current EO, the Board, the Committees and Regions are working toward its implementation.

Recognition of professional expectations

AES has made a strenuous effort to listen to its membership and potential membership – both from those having a professional interest and from the public. The membership expects a regular Journal with relevant articles of a high professional standard that have been subject to peer review. Members are also attracted by regular and relevant opportunities for professional development and skills maintenance. The public expectation of AES is that its membership displays a school of professionals that keep up to date with sector advances and that operate to a code of ethics. The profile of AES is increasingly important for people seeking knowledge and advice related to evaluation practice. The online medium is enhancing the reach of AES across Australasia.

Building critical mass has been important to provide the range of skills, experience & personal attributes along with the necessary wherewithal to make things happen. It has also been important in building the financial base of AES to the point where the survival of the association is assured, providing a professional and credible profile consistent with the sphere of other professional associations. The critical mass is now strengthening AES's influence in advocacy and more widespread promotion of the value of evaluation in accordance with AES standards.

Sound governance principles and practice

In order for AES to function effectively and deliver services such as those described in the previous sections, the AES dynamics have needed to balance: good representation with efficiency; innovation with solid experience; with the needs of individuals, the regions, consultancy firms, the public and the collective professional interest. For efficiency, AES has had to establish adequate records and clearly recorded policies that ensure consistency over time and location. Good systems facilitate quick responses, reduce the need to reinvent the wheel and enhance accountability. Integral to good service delivery is effective multi-directional communication. There are different levels and types of communication required within the organisation, through the Board, committees and working groups; around the regions, with the membership and the public. When

difficulties arise, good communication is essential to finding rapid solutions.

Innovations and lessons learned

The AES has continuously built on lessons learned from its own operation and membership, as well as by maintaining relevance in the global context of evaluation practice. The AES has evolved through a series of phases: from the excitement of establishment, through the challenges of building a regional body; from being an informal interest group to a professional business-driven organization – each phase building from the previous phase.

Nevertheless, there are three main lessons that stand out in the growth of the AES, particularly:

- i. Building credibility with members and the wider community is an important step in the process of establishing a VOPE. This takes time and is dependent on the quality and consistency of some cornerstone recurrent deliverables such as the Conference, the workshop program, a professional journal and good mechanisms for member communication and interaction.
- ii. Governance processes are important and take time to develop in building a strong basis for the operation of a professional society. Each step of installing governance processes takes time and effort on the part of the leadership and membership to ensure that the processes are relevant and efficient. As the organisation changes, there is a need to regularly review and update procedures so that they continually support the existing membership and encourage growth.
- iii. The AES has had to gradually develop a business model that balances income generation with professional interests and sector developments. This has required that the operations of the Society grow and develop through its strategic planning process and in line with member expectations. It has been necessary to achieve the right balance between income generation and expenditure; service delivery and capability that have been critical to AES's sustainability and success.

Next steps

The AES is currently embarking on strategies that build on its core areas of activity in the following ways. The strategies are articulated in the AES Strategic and Implementation Plan and are being actioned through the Committees, Working Groups and Regional Groups.

These include:

- Develop communication products aimed at advocacy on behalf of the sector and field of evaluation and influencing policy around and use of evaluation;
- Develop a stakeholder engagement strategy involving both Australasian governments and Non-Government organisations and the International development sector;
- Review and re-publish the AES Code of Ethics, with a view to enhancing promotion of ethical guidelines around work with Indigenous communities and peoples;
- Design and deliver a viable, annual professional learning program;
- Continue to deliver a successful Annual Conference;
- Continue to develop and enhance the status of the Evaluation Journal of Australasia;
- Stabilise operations, systems and income streams;
- Develop on-line capacity for member communication and interaction;
- Strengthen governance processes between the Board, EO, Committees and Regions.

AES is also cognizant of its own growth and development. It has embedded a culture of evaluation within its own operations. For instance, each Conference is routinely evaluated regarding levels of satisfaction and the professional impact of the Conference on attendees. These evaluations allow for trend analysis on on-going learning. The AES is about to undertake a member survey to gain a better understanding of member needs. With an approach of continuous improvement, AES expects to continue to grow and provide influence and value to the evaluation sector across and beyond Australasia.

COMMUNITY OF EVALUATORS (CoE)

A REGIONAL EVALUATION ORGANIZATION FOR SOUTH ASIA

Shubh Kumar-Range

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Background

The Community of Evaluators for South Asia (CoE) was started under the leadership of the Association for Stimulating Knowhow (ASK) in 2008 with support from IDRC. At the time, evaluation was steadily gaining prominence in the region, through different evaluations being commissioned by donors and the government. Despite a wide variety of approaches and techniques in use, there was limited exchange and interaction among the evaluators to discuss and learn from each other and outsiders. CoE started by establishing a network of evaluation practitioners working in South Asian countries to facilitate exchange of information and interaction. There was a distinct lacuna in the region for such platforms, and very few active national evaluation associations, with the exception of SLEvA in Sri Lanka. The CoE started as a 3-year project titled “Advancing Evaluation Theory and Practices in South Asia – Building a Community of Evaluators”.

Launched in December 2008, its members were selected on the basis of an open call for interest from both evaluation professionals working in South Asian countries, as well as institutions that were conducting or promoting development evaluation. There were initially 28 members selected based on a diversity of nationalities and backgrounds – including independent evaluation consultants as well as evaluators with international or national organizations and NGOs. Countries represented in the initial membership included Bangladesh, India, Nepal and Sri Lanka. It was expected that with suitable

effort, membership from other South Asian countries could also be added. The size of membership was limited and was based on the cost of hosting regular face-to-face (F2F) meetings of the network during the 3 year period. It was expected that during this period this initial group would develop a range of initiatives as well as construct a vision and institutional framework for an ongoing and expanding community of evaluators in South Asia.

During the first three years – 2008 to 2011 – this group organized regular meetings at which a wide range of initiatives were started on themes identified by this group. Four priority ‘Tracks’ were identified : Capacity Development of Evaluators, Dialogue on the status of evaluation in South Asia, Evaluation research and writing, and Institutional Development for the CoE. Individual members volunteered to join in these tracks, and then developed each ‘Track’ with regular reporting back to the entire group, with the expectation that each member would take an active part in shaping some aspect of the agenda of CoE. Each of these four ‘Tracks’ produced significant results, including the Evaluation Conclave of October 2010, and an edited volume on Evaluation in South Asia that is forthcoming.

By 2011 the CoE network had grown to 37 members, and the addition of evaluators from Afghanistan was a big plus. However it remained difficult to draw members from other South Asian countries, namely Pakistan, Bhutan and Maldives. Progress had also been made in terms of increased group cohesion, but institutionalization and expansion of the Network had slowed due to the legal complexities of registration for a regional association in one of the South Asian countries. Restrictions on flow of funds, membership fees collection issues, as well as difficulties in ability of all South Asian nationalities to assemble in some countries, were problems that were identified. However, it was strongly felt that a virtual network was not the preferred option and that a membership-based association or organization was desirable. By now some legal options had been identified, but were likely to take time. Also there was generally a 2 or 3 year period for an association to become a legal entity before it could handle international funds from memberships or project funds raised for evaluation capacity building or other related initiatives. At this time, it was proposed that CoE would begin the process of National Chapter formation, and begin the process of strengthening national evaluation communities, and at the same time finalize its own legal institutional structure.

In 2011 a new 3-year Plan of Work was developed by CoE members, and this has received partial funding from IDRC. Since CoE did not have organizational status to accept or manage funds, another evaluation and research organization – Catalyst Management Services (CMS) that was also a CoE institutional member – was identified to host CoE and manage its accounts. During this Phase II, as we called it, we expected that the IDRC support would facilitate implementation of a significant portion of the 2nd Phase Workplan, including the 2nd Evaluation Conclave; and that CoE would raise additional funds to complement this.

Strategy and Implementation

Goal of CoE

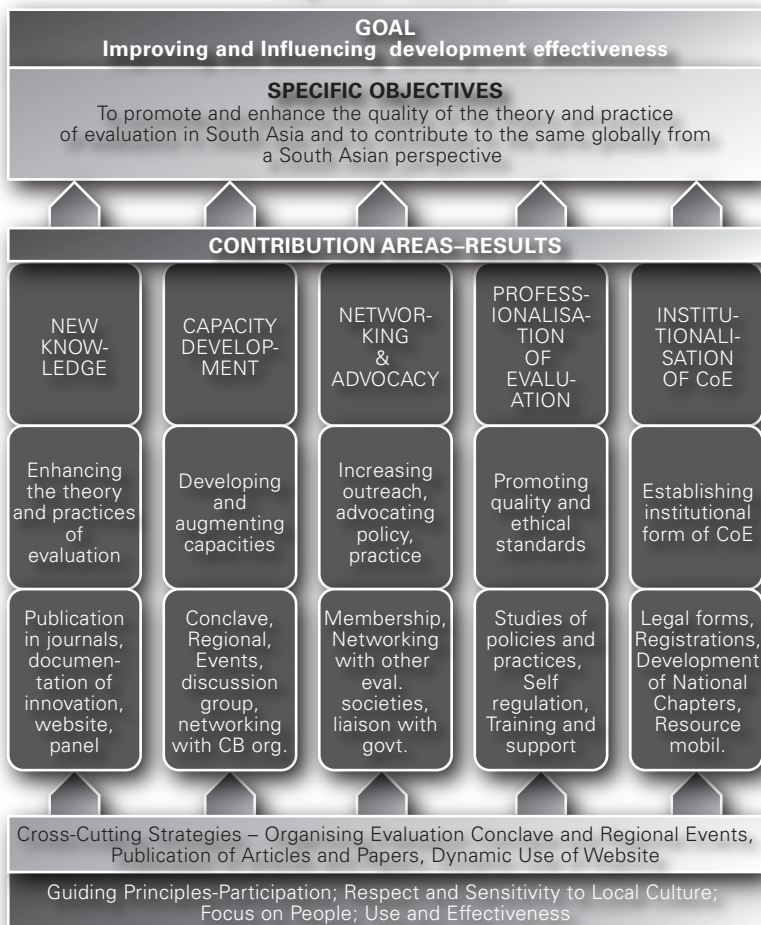
The following goal was identified for the CoE during its conceptualization: “To promote and enhance the quality of the theory and practice of evaluation in South Asia and to contribute globally, particularly from a South Asian perspective.” The CoE seeks to provide the evaluators working in South Asia with a platform where they can learn from each other, and, in turn, contribute to the evaluation field-building globally. South Asia is home to a myriad of development projects and interventions, and the strengthening of evaluation in the region yields benefits for a variety of stakeholders.

During Phase I significant progress was achieved on several fronts, and this is described further later in this paper. Based on this progress and experiences, the functional priorities and objectives were refined for Phase II activities. CoE plans to build on activities that had a successful track record in Phase I, formalize its status by establishing a secretariat and creating a network of evaluation associations across the region. In order to achieve this intermediate goal, the following objectives have been identified:

- Promote and catalyse the use of **new knowledge** to promote the quality and practice of evaluation;
- **Build capacities** for Improving Quality of Evaluation;
- Build a strong **Network and Advocacy Mechanism** to improve theory, quality and use of Evaluation in South Asia;
- **Professionalize evaluation** through code of conduct, ethical standards and protocols for engagement; and
- **Institutionalize CoE.**

The diagram below seeks to explain how this will be achieved:

**Community of Evaluators – South Asia – Phase II of the Project
Programme Framework**



Enabling environment

As the only regional evaluation association in South Asia, and also faced with weak national evaluation networks that could facilitate national dialogue on evaluation and policy, an effort is being made to establish national chapters of CoE or work with existing evaluation organizations. Members from different countries – especially Nepal, Afghanistan and Bangladesh – have begun the process of setting up national CoE chapters/organizations and moving forward to establishing them as legal entities in each of their countries. This would enable CoE funds to be transferred for support of regional and cross-learning activities, as well as support the growth of the national networks.

In addition, to encouraging the establishment of national chapters of CoE, we also started an ambitious study of evaluation practices and challenges in South Asia. The initial version was based on interviewing a large number of evaluators on how evaluations are being conducted and used in decision making in different types of organizations. It is expected that the findings from this study could help in identifying key gaps in the enabling environment to improve the quality of evaluations and their use.

Evaluators in this region still remain distant from engagement with national evaluation policy makers, and the weak evaluation networks and evaluation capacities make it challenging to engage with oversight and transparency of government programs. The main exception to this in South Asia is the Sri Lankan Evaluation Association (SLEvA), which in its initial genesis formed strong a partnership with the Government of Sri Lanka's Ministry of Plan Implementation. It is expected that as the national evaluation networks in the region are strengthened, the possibility for greater engagement will emerge.

Enhancing individual capacities

There are several ways in which individual capacities have been strengthened. First, CoE members were able to network to avail of fellowship funds to attend international evaluation trainings (e.g. IPDET) and evaluation conferences – especially if they got papers or panels accepted. Second, an effort was made to include trainings along with the F2F meetings organized by CoE which were often scheduled along with other events, such as SLEvA's bi-annual conferences. Third, the Evaluation Conclave organized by CoE in 2010 was attended by over 350 evaluation professionals from the South Asia Region and beyond. It was the first such event in the region. Members also made contributions to other evaluation train-

ings and workshops both in the region and in other regions, e.g. at SLEvA, AfrEA and MES.

In CoE's Phase II membership has been opened and we hope to rapidly enlarge our engagement with evaluators and commissioners of evaluation in the region. As part of our organizational development we are now seeking to add a range of networking and knowledge access opportunities for members, as well as structured capacity building and mentoring activities.

Individual capacity enhancement was also part of the 'Writing Track' of CoE's Phase I. We identified early on that evaluators working in the local contexts of South Asia have a wide range of experiences and methodological adaptations that are not reflected in the evaluation literature. Guiding and supporting members to turn these experiences into publishable work has been successful and contributed to a Volume on Evaluation in South Asia which is now under consideration for publication by SAGE. At the same time, scholarly articles documenting evaluation experiences by members are also posted on the CoE website (www.communityofevaluators.org) under its Discussion Paper Series.

Equity focused and gender sensitive evaluation

A variety of participatory and empowerment evaluations that address economic, social and gender asymmetries have been strongly emphasized by South Asian evaluators. Also being emphasized by CoE is the need for strengthening participatory evaluation methodologies.

These are justified given the gross inequities by gender, caste, class and region that are prevalent in this region. In addition, analysis by members has also shown that the governance indicators do not reflect strong demand for evaluation, and that social accountability-oriented evaluations, including those that are well designed and with strong community participation, are more likely to be impactful.

Evaluation practitioners who work at the community level, even if for a limited time, have to confront the tremendous variety of inequities that are present. When this reality is juxtaposed with the inability of prevailing power structures to pay more than lip service to evaluation, the choices available to evaluators are limited. Interestingly, we found that the majority of paper ideas that were developed for our writing project were oriented on equity, empowerment and gender issues and on ways of making evaluations participatory to enable the power relations to not cloud findings. Stay tuned!

Institutional capacity strengthening

As CoE started on its 4th year of operation in 2012, we can look back and identify the following aspects of institutional strengthening that have been fruitful:

- In the first phase activities were mainly managed by ASK in consultation with IDRC's regional office in Delhi, and members focused mainly on activities they were taking on in the four 'Tracks'. In the second phase with the community members having gained the confidence and group cohesion of working together, they are taking on greater responsibility in the strategic management and decision making. This seems to be a healthy evolution, and a step towards managing the network/association that is now in the process of being legally registered, and membership has been opened to all those who are interested. Though we have encountered delays in legal registration, the CoE members have decided to go forward with the election of its Board and Office Bearers. This is due to be completed by the end of 2012.¹
- As part of taking over strategic management and decision making in Phase II, the CoE elected a Strategic Advisory Team (SAT) at its F2F meeting of June 2012. This is an interim arrangement taking on most of the functions to be done by its Board. The SAT works in close collaboration with the CoE Secretariat at CMS and its leadership.
- CoE has been fortunate to have had the management of its Phase I by ASK and of Phase 2 by CMS. This support has been invaluable as the voluntary nature of contribution of time for all activities by its members does have limitations. We found that members who are independent consultants and those who work in institutions that support CoE as institutional members have contributed most of the voluntary time for activities.
- Institutional Development Track members contributed by helping develop the options for legalizing our Organization, as well as drafting our Constitution.

At the present time, the institutional capacity of CoE is still in a nascent form, and we are cognizant that key systems and structures need to be put in place for a strong, vibrant and sustainable organization to emerge.

1 The new Board was elected, and legal incorporation in India announced during the 2nd Conclave in Kathmandu, February-March 2013.

Bottlenecks and challenges

Starting as we did with a collection of individuals who were previously unknown to each other, and working our way towards a cohesive 'community' with mutual trust and knowledge about different interests and capabilities, was perhaps one of the major challenges. Working in teams, the four Tracks in Phase I were conducive to getting members together who shared common interests and commitments and helped a great deal in building us as a Community.

Another challenge was addressing the need for supporting national evaluation networks at the same time as we struggled to build this regional body. As mentioned earlier, with the exception of SLEvA in Sri Lanka there was no other active evaluation network in any of the South Asian countries. We needed to balance the strong need for and interest in our membership for supporting the weaker national systems, with building the CoE organization and membership. This is an on-going challenge that we are working on.

Progress and results

CoE has made good progress towards accomplishing its main objectives, but much work needs to be done to develop a vibrant organization, which will work on the broader evaluation field-building agenda in the region. Some of the key achievements are highlighted below:

1. **Recognition as an Organization in South Asia** – CoE has established itself as a regional platform promoting practices of evaluation. The first Evaluation Conclave ever held in South Asia was a highly successful CoE event in which over 350 evaluation professionals participated and over two dozen internationally reputed evaluation thought leaders conducted workshops and led cutting edge knowledge panels. In addition, members have participated actively in many international events on evaluation, thereby, reinforcing the identity of CoE.
2. **Membership** – The initial 37 individual and institutional members are now being expanded as a result of opening up the organization for membership. As of September 2012 a web-based membership registration platform was established and we expect to rapidly expand our membership.
3. **Institutionalisation** – Clarity and agreement have emerged on the institutional form and efforts are being made to complete

the formal registration process. As an organization, its status is as yet not formalized. It is currently in the process of registering as a non-profit company, which will attract individual as well as institutional members. Pending the legalization of its status, it is planning to elect a Board and Office Bearers that will work with CMS to implement Phase II and to finalize its institutional status, and operational plans for the future.

4. **Capacity Building** – The capacity building agenda has been relatively limited as the original ‘founder members’ were all selected from the most experienced applicants who applied to participate. For this group, most of the capacity development was through facilitating access to scholarships that the CoE membership facilitated – to attend international trainings, such as IPDET, and many evaluation conferences. Additional capacity building was through participating in projects, such as Developing Evaluation Capacity in ICTD (DECI) that many members joined as a result of their CoE membership. Delivering capacity building was mainly through the Evaluation Conclave that CoE organized in 2010.
5. **Contributing to Evaluation Knowledge** – Members who were interested in honing their writing and publishing skills participated in the ‘Writing Track’ which conducted a series of ‘Writesops’. Based on this work, CoE has compiled a collection of peer reviewed papers that is being published in an edited volume. The website of the community has been used as a medium for knowledge exchange in the first phase. The scope and nature of interaction will be improved further in the second phase. Members have improved understanding of different approaches, tools and techniques on evaluation.
6. **Partnership and Alliances** – CoE has established partnerships with EvalPartners and CLEAR, which are international initiatives focusing on capacity building on evaluation. CoE has developed a good working relation with the Sri Lanka Evaluation Association (SLEvA).

Key enabling factors

The most significant enabling factor has been the generous support of IDRC and the thoughtful, wise and creative guidance since CoE’s inception that we received from Katherine Hay, the Senior Evaluation Officer based in the IDRC Regional office in New Delhi.

A second and important mention has to be made of the institutional members such as ASK, who conceptualized and steered the CoE during its first three years (2008-2011). Also, Sambodhi has remained a strong partner taking on tasks that the scattered individual members could not accomplish, such as creating our website, liaising with donors and the regional evaluation community to enable us to conduct the first South Asian Evaluation Conclave.

As the CoE membership has matured and developed its own Phase II proposal and is taking on managing itself as an organization, the partnership of another CoE Institutional member – CMS – support has come to the fore. In their endeavour to help CoE grow into an independent membership-based organization, they have offered to manage the CoE funds and also facilitate and coordinate our Phase II activities. It is expected that CoE will continue to base its secretariat at CMS after it has achieved legal status.

Last but not least has been the passionate commitment of many of CoE's founder members to help build this organization and to enable the field of evaluation to become a force to reckon with.

Innovations and lessons learnt

Several innovative activities and ideas were tried by CoE as the small group of committed evaluation professional from four South Asian countries came together in 2008. These efforts marked a means of overcoming the dispersed and diverse set of backgrounds and experiences that we brought, and helped us to document and understand the larger evaluation context and its needs and challenges that we faced. These innovations included: i) organizing ourselves into four thematic 'Tracks' which enabled members to come together and work to develop outcomes that would not have otherwise been possible with such a small group we had; ii) a close partnership with IDRC and support from the Regional Office in Delhi was instrumental in building our capacity and enabled the success of our first Evaluation Conclave as well as the peer reviewed edited Volume on Evaluation in South Asia being produced.

Keeping the group small in the initial Phase of CoE may have helped to build cohesion within the membership and get more traction in achieving results than would have been possible otherwise. However, it may have also delayed the opening up to new membership as there was a high comfort level in working in the familiar terrain with existing members, and as a result diluted the energy and momentum to some extent.

Lessons learnt include:

1. Institutionalisation built on a sound foundation is important for long-term growth. CoE's main aim was to develop a regional platform in South Asia, and also to help build national evaluation associations. These dual objectives may have needed to be staggered, but we were in a hurry and wanted to do both, and conceptualized national chapters for CoE, even prior to the Regional CoE's membership taking off. Trying to do both could have slowed down our momentum in institutionalization the Regional CoE. As a result, four years into our endeavour and we still do not have a legal registered entity. A Constitution was drafted in Phase I, but still is not a 'living document' and By Laws as well as Board are still not in place.
2. Being a nascent organization, and still without legal basis, the CoE South Asia needs the support of another institution to serve as a formal Secretariat to deliver key functions related to financial management, coordination and communication. After the initial incubation period of Phase I, the current situation is one of transitioning of the Community to formulating and managing its own agenda and priorities. Thus, the role of the Secretariat should be nuanced and the members should interact closely with the Secretariat to develop, guide and fulfil the CoE's long term strategy.
3. Creating a Community goes beyond membership and organization and institutionalisation. It requires a common engagement, commitment and shared values and shaping a common vision. This is an ongoing process and cannot be taken for granted only because members come together from time to time and have common activities.
4. Membership-led organisations are run largely on voluntary inputs of members. However, there should be a clearly stated and acted 'Responsibility and Incentives Framework' with tangible and intangibles to ensure that members are having a clear idea about what they are expected to contribute to and what benefit will they receive in return. The members who see the value and importance of the CoE contribute the most time, but those who have busy and successful careers also have time constraints given their other commitments. The CoE needs to continue engagement with the successful members to leverage benefits and at the same time encourage and engage with other members who are also able and willing to contribute more towards the

growth of the organization, without taking those who give time for granted. Expansion of membership is again crucial for this to occur.

5. In the formulation of the Phase II proposal, a principle of token gratuities was made to motivate members to allocate time for substantive inputs required by the membership. Setting up clear and transparent operational mechanisms for this can be challenging. This can be further exacerbated when the organization is still informal in nature and does not participate in the budget allocation or reporting process.
6. Sustainability – Collective platforms cannot run endlessly on donor resources. Donor support provides a start-up capital. There needs to be a robust self-generating business model in place that is based on expansion of membership and provision of value. More complex business oriented income generation activities are likely to be too complex for membership organizations to manage and could be a drain on limited resources.
7. Attention to developing value for an expanding membership is key to long term sustainability. A range of options – online and offline – and technological solutions should be found out to ensure that the engagement and communication is ongoing and members are able to give their inputs.
8. “If you want to go fast, go alone; if you want to go far, go together”. While working in a collective, difference in opinion and friction is bound to arise. However, these should not be seen in negative light. We should aim for accommodation, diversity and a common goal.

Next Steps

1. **Institutionalisation** – Extensive deliberation for over 1.5 years has led to key decisions on the legal identity of CoE. The CoE-SA is being registered under the Section – 25 Companies Act in India. This work will be completed in the next couple of months. CoE will select its board and its Executive Committee, which will have representation from the member countries. These structures will formally take responsibility of guiding the management of the affairs of CoE. Finalizing the Constitution and By Laws that will guide the organization and help to develop clear and transparent operational procedures will be completed.

2. **Expanding and diversifying the membership base** – The membership has been opened to all who are interested in evaluation in general and practice of the discipline in South Asia in particular. A membership drive is also being organised through regional outreach events across South Asia. The outreach events will focus largely on connecting the evaluators and other stakeholders at the national, state and grassroots level, and facilitating insights on the evaluation practices, policies, participation of stakeholders and utilization of evaluation. This will bring in the rich experiences on evaluation from South Asia.
3. **Identifying and building member services and value**
4. **Capacity Development** – The regional events will have dedicated capacity building agendas, which will be planned for. These events will be paid events and the clientele will be the practitioners in South Asia. CoE plans to hire the support of international expertise on evaluation, who will work as Advisors to CoE and provide technical support and guidance. This Advisory Body will mentor a group of internal resource persons, who will be groomed as future trainers for CoE. This will be done to ensure internalisation of skills, knowledge and practices and enable wider application in the South Asian context.
5. **Professionalization of Evaluation** – Building on the desk research, which was done in the first phase of growth, the evaluation standards and protocols will be finalised through wider internal and external consultation and then published. These standards and protocols are expected to guide the planning, execution and management of evaluation.
6. **Sustainability Plan** – This is being developed and will be oriented to identifying and building membership as well as member services and value. International expertise to advise CoE and to strengthen organizational capacity and build up core reserves will be a focus. The CoE defines sustainability at two levels: professionalization agenda continues strongly, by evolving constantly to the requirements and, secondly, there is financial sustainability to the key actions of the CoE and its partners in each country, so that membership processes are robust.

CoE is young and is growing from strength to strength and hopes to steadily work to build an effective organization that will showcase the tremendous colour and strength of the region's expertise and experience, and work tirelessly to promote evaluation field-building in South Asia.

EUROPEAN EVALUATION SOCIETY (EES)

MAKING A DIFFERENCE: SUPPORTING EVALUATIVE PRACTICE THROUGH THE EES

María Bustelo

EES President

Murray Saunders

EES Representative to IOCE

Background

Beginning

The European Evaluation Society (EES) was founded in 1992, and its first founding conference was held at The Hague in December 1994. At the end of this conference, a Transitional Board was elected for organising the election of the first President (Fall 1995) and for drafting the statutes, which were registered in 1996. The main driver for this development was the emerging professional needs of individuals who had an interest or who were engaging in evaluation within the European context but did not have a national expression of this interest. The key players at that time were academics and auditors. The Netherlands Court of Auditors had a special role in the beginning in the provision of secretariat services and some in-kind support, as well as the Belgian Court of Auditors which held the secretariat from 1998 to 2003. After a short period in which some services were provided through a part time secretarial position at his University of Southern Denmark, and from 2004 onwards, the EES entrusted secretariat support to a private association management company.

The Board

According to the statutes of the EES, there are a total of 12 possible members of the Board. Of these, eight are elected positions, 2 of them being the Vice-President and President. From the other 6 elected Board members, the roles of Secretary General and Treasurer are assigned. Since 2011, there is the possibility for the Past-President to remain in the Board for one year, and for co-opting up

to three additional Board members for specific tasks. In 2012 the EES had eleven members of the Board.

The EES mission

The goal of the European Evaluation Society is to stimulate and promote theory, practice, and utilisation of high quality evaluation especially, but not exclusively, within Europe. This goal is obtained by bringing together academics and practitioners from all over Europe and from different professional sectors, thus creating a forum where all participants can benefit from the co-operation and bridge building opportunities of the EES. The main vehicle for this knowledge exchange is the biennial conference. In addition, EES works to provide a platform to interact, discuss and network amongst evaluation professionals, through means such as Thematic Working Groups, web-based tools/ forums and ad-hoc events.

Membership

At this point in time the EES has a good balance of academics (30%), free lancers (18%), private consultancy workers (22%), evaluation commissioners and evaluators at governmental institutions (8%), supranational (3%) and international organizations (11%), and NGOs/non-profit institutions (7%). From survey responses from 326 members in May 2012¹, 82% conduct and/or do evaluation, 42% teach evaluation, 43% carry out research on evaluation, 31% commission and/or manage evaluations, and 4% are students². The disciplinary composition of members is 15% Public Administration, 15% Economy, 13% Political Science, 13% Sociology, 10% Education, 7% Business Administration, and engineers, social workers and psychologists (3% each one) other categories 15%. The EES has as of September 2012, 488 individual members and 30 institutional members.

Key constituencies are those that make up the European Evaluation community. This embraces evaluators, commissioners, academics, students or new practitioners from other disciplines. In addition the EES sees the European Union as an important player through which the EES can help support good practice in regional and national evaluation.

1 This is a 'mark all that apply' item, so percentages in each category do not sum up 100%.

2 The EES has only recently been promoting students' involvement in the Society.

In Europe over the last ten years the evaluation community has become increasingly aware of the differentiation of evaluation cultures from country to country. The extent to which evaluation is actually sought by (and built into) civil society and government institutions varies enormously. In some administrations evaluation is done routinely. In others it is virtually absent. The mandatory evaluation of EU-funded programs at EU level, but especially in the EU regions, has acted as a major driver in the growth of evaluation practice in Europe.

When EES was founded by individuals, almost no national evaluation societies or networks existed³. Today more than 20 national societies and networks can be identified in Europe. Sharing of experiences and practices as well as organizing training on national level were the main drivers for the establishment of national societies. The EES has helped in the creation of national societies. The EU – a major client and promoter of evaluation in Europe – has significantly fostered the development of evaluation capacity building in Europe in government administrations as well as the civil society.

NESE (Network of Evaluation Societies in Europe)

At the EES Conference in Berlin (2004) a first session with the presidents of national societies took place. In 2008 some evaluation societies in Europe expressed their strong interest in exchange and the French Evaluation Society (*Société Française d'Évaluation* -SFE) initiated, in cooperation with the EES, a gathering within their pre-conference program in July 2008 in Strasbourg. This meeting was followed by a further meeting in Lisbon in October 2008 at the EES international conference at which the broad approach and structure of a network of evaluation societies in Europe was developed. Further meetings in Muenster in Germany in 2009 and Prague in 2010 developed the idea and established a programme of activity. The structure that emerged placed the EES as a core partner and with one other European society or network as co-coordinator for a two year term. To date the NESE co-coordinators along with the EES have been the SFE (The French Evaluation Society), DeGEval (The German Evaluation Society) and the Italian Evaluation Association.

The mission of NESE is to promote quality and independence of evaluation in Europe. NESE is the European forum for national evaluation associations and societies to foster exchange of knowledge as well as good practices and to promote professionalism and quality.

3 The Swedish Evaluation Network which preceded the Swedish Evaluation Society started in 1989 and by the mid-90s had around 350 members.

NESE aims to build the capacity of associated evaluation societies to develop sound and independent practice. It provides the arena where evaluation societies can learn and support each other to promote good evaluation practice in their countries. It also gives support to the foundation and growth of new evaluation societies in evolving governance structures, providing value to members, developing standards and guidelines, and organizing conferences.

Strategy and implementation

Strengthening the enabling environment

- The EES and NESE work together to promote national evaluation societies in Europe with a view to strengthen the evaluation culture of national governments and the civil society. The main vehicle the EES uses for this is the promotion and co-coordination of NESE (see above).
- The EES produced a general statement on Ethics and Standards in 2004. This document encouraged the creation of standards in national societies, but explicitly ruled out the formulation of 'European standards'. Next, the EES developed an evaluators' capabilities framework that was validated through two surveys. Again, the intent was not to impose Europe-wide standards but rather to encourage professional development and the promotion of an evaluation culture adapted to country contexts.
- The EES capabilities initiative responds to a groundswell of interest in evaluation competencies⁴. With growing pressures for more accountability in government, the private sector and the voluntary sector, demand for evaluation services has increased rapidly and expectations have risen regarding evaluation quality. In response, many European evaluation societies have issued guidelines focused on evaluation ethics and processes⁵. All such guidelines assume that evaluators are equipped to meet appropriate standards of professional practice⁶. In line with this

4 The DAC Evaluation Network, the United Nations Development Program, the UK Evaluation Society and the Department for International Development of the United Kingdom (among others) have addressed or are working on various facets of evaluation competencies. The International Development Evaluation Association (IDEAS) has issued a competency framework for development evaluators.

5 Robert Picciotto, *The Value of Evaluation Standards*, Journal of Multi-Disciplinary Evaluation: JMDE (3) 30 ISSN 1556-8180

6 See for example, the UKES guidelines at <http://www.evaluation.org.uk/resources/guidelines.aspx...> They define the distinctive accountabilities and reciprocal obligations of different categories of evaluation stakeholders.

presumption, a voluntary set of capabilities associated with the practice of evaluation in Europe is intended to complement existing ethical guidelines and put the capping stone on the trilogy of ethics, standards and qualifications that underlie all professional designations.

- The EES has influenced on-going and dominant evaluation debates and discourses by the provision of statements and manifestos. An example of this is the influential statement on impact evaluation in 2007 titled “The importance of a methodologically diverse approach to impact evaluation”.

Developing/strengthening a sustainable strategy to enhance individual capacities

- The EES has promoted specialized and high quality training in conferences (pre-conference workshops) at each of 10 conferences to date.
- Outside the conferences, there have been international master classes on specific themes (Odense in 2009 and Seville 2007).
- Within Europe, the EES, in collaboration with other partners or singly, have set up evaluation events. The most recent was in collaboration with the European Commission in Brussels in 2011 titled ‘The Vision and Logic of Evaluation’. Before, we organized events at the University of Southern Denmark, Odense and in Fribourg, Switzerland in the non-conference years of the EES.
- The EES has encouraged specialised university based programmes in evaluation. The USPE University Based Programmes in Evaluation Group was set up in London with 5 programmes, now six (Bern, London, Lyon, Madrid, Odense and Saarbrücken). The EES, in collaboration with Bern, undertook a survey of education programmes in Europe. There is a document, describing 11 master programmes in Europe on the EES website under ‘Training and Jobs/Master Programmes on Evaluation’ which is frequently consulted.
- In the 9th and 10th EES Biennial Conferences (Prague 2010; Helsinki 2012) prizes for best papers and posters have been awarded. There has been a special student award in both occasions, and in Helsinki three categories of best papers were awarded: for the best contribution to evaluation research and methods, to improved evaluation practice, and to improve public policy and governance.

- The EES closely collaborates with the Journal *Evaluation*. Each EES member receives a copy of *Evaluation*, as well as electronic access as part of his/her membership. The Journal was launched to promote dialogue in Europe and internationally and to build bridges within the expanding field of evaluation, so the society and the Journal mutually support and feed each other. After each EES Biennial conference, a special issue of the Journal on the conference is prepared in collaboration with the Society.

Strengthening equity-focused and gender-sensitive evaluation systems and evaluations

- Influencing through the development of Thematic Working Groups (TWGs): this initiative can be potentially influential. The most advanced TWG is on 'Gender and Evaluation.' It works together establishing links with UN Women, the European Community of Practice in Gender Mainstreaming and the European Institute for Gender Equality (EIGE).
- In the 2010 EES international conference in Prague, there were several sessions on gender issues, and this has been a trend towards Helsinki, where there were other sessions on equity and empowerment.
- The EES Board is attentive to gender and evaluation. The EES has started some gender analysis on the membership and the activities performed through the Society. For example, the EES is trying to find out why the figures of male-female members are 60-40% when there is a profession with a certain feminization tendency, when in other societies the usual proportion is 31-69% (in the AEA), and in many training and university programmes the tendency is even more clear (25-75% at the *Universidad Complutense de Madrid* (UCM) Programme, for example). A more in-depth comparative analysis is needed.
- The EES has made big efforts, since Lisbon (2008), to get bursaries for evaluators in developing countries to attend its biennial conferences. Thanks to several donors, 75 bursary recipients have attended the 10th biennial conference in Helsinki in October 2012, helping us to make it a real international event especially sensitive to equity issues.
- A new Thematic Working Group (TWG) on Evaluation of International Engagement in Fragile Situations has also been launched. This group aims at working in the diverse and complex

force fields that affect development effectiveness in fragile states and conflict situations, including a focus on equity.

Institutional capacity to be able to deliver on the three issues identified above

- The capacity of the EES itself, in particular its Board, has been a continual area of development and improvement. The EES has overcome earlier problems with its secretariat services.
- The work of the EES Board is distributed through working groups and activities. Each activity or group has a dedicated person of responsibility for their area and reports on developments at the EES Board meetings which are mainly held virtually, to save costs. While these groups and activities may change over time to respond to changing circumstances, a typical array of groups and activities are:
 - Conference
 - TWGs around general areas of strategic interest.
 - Members' services
 - Newsletter- 'Connections'
 - Professional development and capacity building
 - Communications
 - Non-conference years and 'ad-hoc' events
 - Relations with the *Evaluation* journal
 - Recruitment and fund raising
- One of the most important strategic priorities, apart from the professionalization of EES service providers and a dedicated Board, is the analysis of the community and membership. It is vital to know better the community the EES targets, that is, who are EES members and what profile do they have, including background characteristics and main interests. There was little information before 2009 on this issue, and what the work demonstrated was intuitive and not systematized.
- The EES has used surveys as a tool which enables communication and getting active participation from members and for getting useful information on members. The NESE surveys (2008; 2010) are a case in point as is the background information survey to members (2009). In that way the EES is building a better profile of its members.

- In 2011, the EES systematized the information addressed in the 2009 survey, doing an 'Individual Member Profile' in the Member Area of the web site. This is where each member can put his/her information in a survey style, so now it is very easy to recover that info at any moment for analytical purposes.
- The EES will continue with more 'in-depth' analysis of its membership.

Bottlenecks and challenges

1. The EES has a relatively small membership which fluctuates depending on conference years. The small membership results in a weak budget for other activities apart from the conferences. The EES could do much more with a better recruitment and funding activity.
2. The EES should develop stronger ownership and a more substantial participation of members in the society. The challenge is to make membership understand that the EES is more than a service provider; the Society is collegial in which there are many possibilities of doing things as a community. Our aim is to follow the principle of -"It is not only about what the society can do for you, but what you can do for the Society".
3. There should be continuous communication with and among members; the Society is intensively present during conference times, but there is a need to be more present and utilize more efficiently the possibilities Social Networks and new IT's allow. The EES has improved, but there is much to do in this regard. The 10th Biennial Conference's Theme (Evaluation in the Networked Society: New Concepts, New Challenges, New Solutions') was indicative of this concern and commitment.
4. The EES, a regional-supranational player with clear and interesting opportunities as such, faces also the challenge of developing an 'European Evaluation Space', i.e., defining a clear picture of EES territory vis-à-vis national societies and how to coordinate action between them. NESE is grappling with this issue.

Progress and results

1. *The Biennial Conferences*

The EES has steadily improved conference quality and organization, number of delegates, number of papers, international

presence, and donors for bursaries for evaluators in developing countries, etc. Due to the financial crisis in Europe some evaluators have been affected by budget cuts and restrictions, not being able to participate in Helsinki 2012.

2. ***Developing events in non-conference years***

The Seminar 'The logic and vision of Evaluation' held in Brussels in early December 2011 was a success as has been the case with other non-conference years events of the EES. The whole event was filmed and made available to a wider audience on the EES website (www.europeanevaluation.org).

3. ***Thematic Working Groups***

The EES has four TWGs: 'Gender and Evaluation', 'Evaluation in Fragile Situations', 'Professionalization' and 'Sustainable Development Evaluation'. The hope is that more new TWGs will be formed in coming years.

4. ***Improved Secretariat and service provider***

5. ***Communication***

The EES Board is intensifying the communication side, especially in the communication with members: EES website which is constantly updated; periodic presidential letters; the newsletter 'Connections'; a LinkedIn Group and Twitter and Facebook accounts used for interacting and news, for which it has received very positive feedback from its membership bases.

6. ***Membership policy***

The membership policy has two main aims: (1) to foster the entrance of new blood into the membership and (2) to increase membership and retain existing members. As concerns the first, the EES has implemented a reduced conference fee for students in 2012 (duration of three years maximum), organizes a student paper award at the biennial conference and a volunteer program for students in conferences. There are signs that this is working and a future increase of 'new blood' in EES membership is to be expected. To respond to the second aim, the EES has started to organize, in 2011 for the first time, additional activities outside the conference years. As indicated above, the access to the membership area of the website and the inclusion of the *Evaluation* journal are other ways to make the EES attractive to its members.

Key enabling factors

- The regional nature and the possibility of influencing at the supranational level.
- A strong set of partners and allies, both at the international (IOCE, EvalPartners and others) and national level (through NESE and national societies).
- Dedicated Boards over the years. The EES has not had a problem in recruiting active and committed members to the Board which is an indicator of the potential for regional organizations for evaluators.
- The opportunity of having a professionalized service provider who is open to on-the-job training.
- A natural route to influence at regional government level with good relations with the relevant EU contacts and 'gatekeepers'.

Innovations and lessons learned

- The EES experience suggests it is important to develop a dedicated set of activities beyond conferences to build 'presence' in the European constituency.
- Explore and use the possibilities of new IT's, Social Networks, Web 2.0 and Web 3.0.
- Work and coordinate strategically with partners and allies including NESE, IOCE, and international agencies.
- Think strategically and in a policy-based action (the EES is already an 18 years old organization, with certain path dependency): question, know what you want and go for it. This may involve periodic 'blue-sky thinking' sessions to check on mission.

Next steps

- Increase the number and the continuity of members, as well as their sense of identification with the community and their Society. The EES is working towards a renewed membership policy which fosters this type of participation. The main strategy for this is to increase presence in the way outlined above.

- Develop a new communication strategy by using a wider array of technologies including social networking media.
- TWG strategy in which strategic work can be focused with dedicated leaderships.
- Explore the possibility of a training strategy to run alongside and between conferences exploring training possibilities through webinars, on-line training, etc.
- Look for donors inside Europe.
- Recover EES history: this will require requests from past presidents and Board members to provide archive material they may have in folders and documents they possess.

THE COMMONWEALTH OF INDEPENDENT STATES (CIS) REGION: INTERNATIONAL PROGRAM EVALUATION NETWORK (IPEN)

BUILDING EVALUATION COMMUNITY IN A DISINTEGRATING REGION

Natalia Kosheleva
IPEN Chairperson

Background

IPEN covers the region that used to be one country – the USSR. Evaluation came to the region in the early 1990s after the fall of the USSR, along with the technical assistance and charitable programs of international donors. Initially these programs were operated and evaluated by expats. But by the mid-1990s the situation changed, though only in the NGO sector. Several NGO centers managing national grant and capacity building programs for NGOs were established in a number of the CIS countries. These centers started to hire local specialists to do program and project evaluation, which stimulated the interest in the profession of evaluation in the region.

In 2000 four of such centers: Horizonti Foundation (Georgia), CCC Creative Center (Ukraine), Center for NGO Support and Siberian Civic Initiatives Support Center (Russia) – joined by Process Consulting Company (Russia) – launched the International Program Evaluation Network (IPEN) to promote and develop evaluation in the region. IPEN's mission is to develop program evaluation as a full-fledged profession in the CIS region.

Strategy and implementation

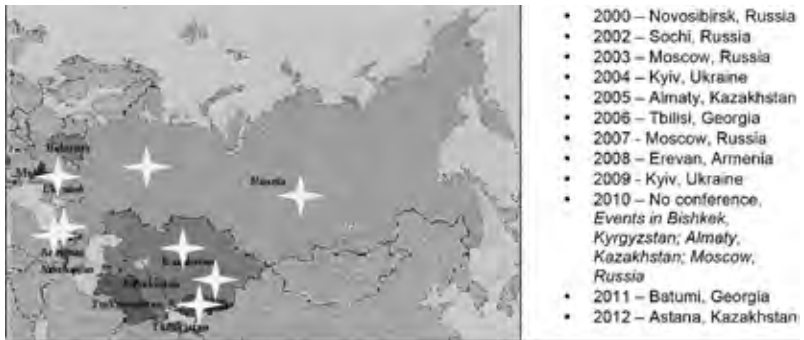
IPEN objectives are:

- To build a community of program evaluation specialists in the CIS, help them establish and develop contacts;
- To develop program evaluation theory, methodology and professional practice;

- To improve and promote principles of program evaluation;
- To develop educational programs on program evaluation;
- To disseminate information about program evaluation policy, methodology and practice;
- To integrate local evaluation specialists into the international professional community, and to develop contacts with international evaluation associations.

The principle vehicle towards these objectives is IPEN's annual conferences. Every year the conference is held in a different country. Each conference not only provides a platform for professional exchange but also stimulates interest in evaluation and gives a boost to its development in a host country. Fig. 1 shows dates and locations of the past IPEN conferences.

Figure. 1. History of IPEN conferences.



IPEN uses several approaches to maximize the range of learning opportunities offered by its conferences. People who are new to evaluation can attend a pre-conference seminar for beginners, which is offered at every conference. Other pre-conference seminars are usually delivered by leading evaluation specialists from outside the CIS region which helps to bring new evaluation ideas and methods to the region.

Evaluation schools are another instrument used by IPEN to promote evaluation in the region. Since 2000 IPEN conducted 4 such schools: twice in Novosibirsk/Russia (in 2001 and 2010), in Kemerovo/Russia (2006) and Astana/Kazakhstan (2009). Each evaluation school offered a course for beginners as well as advanced sessions.

IPEN has also implemented several stand-alone projects. In 2009 IPEN published a book *"Program Evaluation: Methodology and Practice"* (in Russian). The book included texts written by internationally recognized international evaluation specialists Michael Quinn Patton, Rita O'Sullivan, Jean Quesnel and Thomas Grayson as well as evaluation specialists from the IPEN region.

In 2011 IPEN implemented a project that introduced Transformative Mixed Methods Evaluation (TMME) to the region. A group of evaluation specialists from the region learned about TMME from US professor Donna Mertens, the author of the concept, at the seminar in Almaty, Kazakhstan. Afterwards they conducted a series of training events in their countries to spread the methodology. The project also developed a special page on the IPEN website offering materials on TMME in Russian and English.

IPEN maintains a website (www.eval-net.org) that has a library with materials on evaluation in Russian. In the early 2000s IPEN tried to produce a regular e-mail newsletter. It was expected that IPEN members would contribute to the newsletter, but this did not happen, and after a while production of the newsletter stopped. At present news items are distributed to members via e-mail as they come.

IPEN has developed a set of the Program Evaluation Principles that are published on its site.

Institutional capacity

IPEN was established as and still remains an informal network with a free membership open to any interested individual. Sustainability of the network is ensured by its Board. Initially the Board was made of the representatives of the five founding organizations. The Board defines the strategy of IPEN and makes all operational decisions. All members of the Board work on a voluntary basis. IPEN does not have a secretariat, which allows IPEN to minimize its operational costs. Organizations that are represented on the Board use their resources to cover IPEN operational costs, e.g. website hosting and IOCE membership fees.

New members can join the Board by invitation of the Board. In 2005 this invitation was extended to and accepted by ARGO (Kazakhstan) and UNICEF. In 2010 the Institute for Humanitarian Design, representing informal M&E Network of the Kyrgyz Republic, was added.

Model for management of conferences

IPEN conferences are organized either by one of the Board member organizations or by a partner organization based in the host country that is selected through an open competition. An organization that organizes the conference is responsible for arranging premises, Russian and English simultaneous translation, printing conference materials and visa support to conference participants. The organization is entitled to select the conference topic that is most appropriate to the local context and to be involved in the development of the conference programme. IPEN Board reviews and approves the topic offered by the organizer.

The conference organizational committee is made of representatives of the IPEN Board, representatives of organizers and sometimes of local evaluation specialists recommended by the organizer. This approach helps to ensure that a conference meets national needs of the host country and is also relevant to the CIS region.

Conferences are funded through fees by participants. In 2004 and 2009, when the conferences in Kyiv were organized by the IPEN Board organization, CCC Creative Center, all conference costs were covered by the revenue from participants' fees. Other conferences received financial support of various donor organizations. For example, the 2011 conference in Batumi, hosted by IPEN Board member Georgian Evaluation Association, was partially supported with the grant from UN Women that provided for travel grants for participants working on gender and equity issues. The 2012 conference in Astana, Kazakhstan, organized by ARGO, also an IPEN Board member organization, was supported by the Soros Foundation.

Model for management of grant projects

Grant projects implemented by IPEN are managed by one of the IPEN Board members selected by all Board members. For example, the project to produce a book *"Program Evaluation: Methodology and Practice"* funded by IREX was managed by Process Consulting Company, Russia. The project to introduce Transformative Mixed Methods to the region was managed by ARGO, Kazakhstan.

Grant proposals are developed by a working group made of interested Board members. A managing organization is responsible for financial and administrative management of the project. Substantive management is done by a project steering committee made of several Board members.

Networked management as a source of sustainability

The structure of the IPEN Board can be described as a tight network of organizations committed to the development of the profession of evaluation. The use of such a “networked” management approach allows IPEN to operate without a secretariat and thus minimize operational costs. It also helps to minimize the risks related to relative instability in the CIS region. For example, in 2010 IPEN had to cancel its conference in Bishkek, Kyrgyzstan, because of the revolution in Kyrgyzstan. Members of the Board decided that it was too risky to invite participants from outside Kyrgyzstan while there still was a high possibility of violence. Instead the Board members from Kazakhstan and Russia organized national events – seminars and round tables for national evaluation specialists. The Institute for Humanitarian Design, that in 2010 was the IPEN conference organizing partner, conducted a series of evaluation events in Kyrgyzstan. Some of these events were broadcast online.

Progress and results

By 2012 the number of specialists working in the field of evaluation in many countries of the CIS region has reached the level by which they feel that there is a need for close professional exchange on the national level. IPEN activities have definitely contributed to this result by providing space for learning and professional exchange. For example, one of the first meetings where evaluation specialists from Ukraine discussed the idea to establish a national VOPE in Ukraine took place at the IPEN conference in Batumi, Georgia, in 2011. The group of people who are working to establish a Russian VOPE got to know each other through IPEN conferences.

Bottlenecks and challenges

The emergence of national VOPEs is changing the context in which IPEN operates, and IPEN will have to develop policies and strategies for working with national VOPEs. Another challenge is a growing diversification in the CIS regions. When IPEN was launched, Russian was the common language in the region. Twenty years after the fall of the USSR, in many countries there is already a generation of professionals who don't know Russian, and English is progressively assuming the role of international communication between professionals within the region.

Another result of diversification is there are different levels of evaluation development in different countries of the CIS region. While in some countries evaluation was recognized and adopted by the government as a useful management tool, in others evaluation is still practiced only in the NGO sector and by international organizations. This means that it is becoming more difficult to find themes and issues that are relevant for the whole of the region.

LATIN AMERICA AND THE CARIBBEAN: RED DE SEGUIMIENTO, EVALUACIÓN Y SISTEMATIZACIÓN EN AMÉRICA LATINA Y EL CARIBE (ReLAC)

CHALLENGES AND POSSIBILITIES OF AN EVALUATION NETWORK IN LATIN AMERICA AND THE CARIBBEAN: THE CASE OF THE ReLAC

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ReLAC Representative to IOCE

Background

The Latin America and the Caribbean Evaluation, Monitoring and Systematization Network (ReLAC) is a network of networks aimed at contributing to capacity building in monitoring and evaluation, and to professionalize the evaluation function in Latin America. Its origins and history has been marked by several milestones, some of them are mentioned below:

- a) The creation in 1997 of the Electronic Network Program PREVAL¹ (<http://preval.org/en>), pioneering initiative in the region, designed to call and strengthen the capabilities of the evaluation community in Latin America and the Caribbean. Various activities within the network helped the initial establishment of the evaluation community in the region: electronic conferences, information exchange, preparation or compilation of materials that were widely disseminated, and so on.
- b) The first national evaluation networks formed in this period were the networks of Central America, Colombia, Peru and Brazil. They made the first network activities in their national contexts, and participated in actions for the establishment of the IOCE.

1 PREVAL was established as a regional platform of development resources, offering technical assistance, training as well as knowledge management. It has a learning community on Monitoring and Evaluation of Rural Innovation, a public information service, a web portal in Spanish and English, a virtual library, links, and a multimedia section that has more than 300 texts on evaluation and systematization.

- c) Participants representing Latin America worked on the organizing committee of the founding assembly of the IOCE held in Lima, Peru in March 2003. On the occasion of the inaugural assembly of the IOCE, representatives of the networks of Colombia, Peru and Brazil, alongside the PREVAL network, agreed to initiate a process of consultation and action for the formation of the Latin America and the Caribbean Evaluation, Monitoring and Systematization Network (ReLAC).
- d) In September 2003, during the conference of the Brazilian Evaluation Network, the first strategic planning meeting of ReLAC was held, and its vision, mission and objectives were formulated. It was agreed to hold the first Conference of ReLAC in October 2004 in Lima, Peru, with the support from various institutions, especially PREVAL, UNICEF and the Peruvian Network for Monitoring and Evaluation.

The main driver for the creation of the network was the absence of a space where the evaluators in the region could share their experiences and strengthen their evaluation skills. The general context was that of a very weak or no evaluation culture in Latin America and the Caribbean, so it was essential to work towards strengthening the culture and practice of monitoring, evaluation and systematization, understanding this as a political process that would help to improve policies, programs and projects in an environment of more transparent and participatory citizenship.

The first conference of ReLAC was held in Lima (Peru) in October 2004 around the topics of "Evaluation, Democracy and Governance: Challenges for Latin America and the Caribbean", and was attended by 135 participants from 25 countries. One goal of this conference was to provide support to the four national evaluation networks (Central America, Colombia, Brazil and Peru), and encourage the creation of new networks in the context of a process aimed at developing ReLAC. In the strategic planning meeting held during this conference, there were 16 networks formed and in the process of formation, and the first Executive Committee was elected. At the conference there was the constitution of groups oriented to the creation of national networks, the formulation of a strategic plan for ReLAC, and the process of joint work from experts from different universities of the region in order to promote a proposal of a virtual master of policy and program evaluation. After the first conference of ReLAC, the involvement of evaluators in the email list increased (and this was a key instrument in the initial and subsequent actions of the network), the process of creating national networks was con-

solidated, and a working group was constituted of members of universities and training institutions interested in preparing a graduate program in evaluation (which is discussed later).

The second ReLAC conference was held in July 2007 in Bogotá (Colombia), with the Colombian Evaluation Network as a host. It had 163 participants from 22 countries, and its main purpose was to promote a regional dialogue with the participation of actors from government, civil society and aid agencies, aimed to propose better ways to approach and do monitoring and evaluation, in such a way that will contribute to more efficient and effective democracy and governance in Latin America. A key issue addressed during the conference was the participation of civil society in monitoring and evaluating (in particular) and the performance of public sector and the social sector (in general), considering that monitoring and evaluation practices can and should play an important role in strengthening civil society. In turn, the conference sought to identify strategies that would enable ReLAC and its national networks to be more effective and efficient in their efforts for capacity building and professional monitoring and evaluation in the region.

The third conference was held in July 2010 in San José (Costa Rica), and was co-organized with the University of Costa Rica under the topic "Evaluation and Citizen Participation in Latin America: Debates and possibilities in a context of social reform and political change."² The Conference was attended by over 250 people from 24 countries from Latin America, North America (USA and Canada) and Europe (Germany, Spain, England). In different sessions the issues of the professionalization of evaluation and the development of innovative and effective strategies that link evaluation with development objectives and the ongoing reforms in the countries of the region were discussed. The three major themes worked were: (a) evaluation and systematization in Latin America: current situation, trends and prospects, (b) new features and institutionalization of evaluation, (c) professionalization of evaluation in Latin America.

Strategy and Implementation

The ReLAC vision aims to strengthen the culture and practice of monitoring, evaluation and systematization as a fundamental social

2 The development of the Third Conference of ReLAC and the International Congress of Evaluation was made possible through the combined efforts of the University of Costa Rica and ReLAC, and it was sponsored by the following organizations: Prodev-BID, Evaluation Group / World Bank, EZE, UNDP and UNICEF.

and political process held in order to improve policies, programs and projects in an environment of greater transparency and citizen participation. To do this, ReLAC put forward the following objectives:

- (a) to create and support spaces for exchange and reflection among professionals and organizations interested in monitoring, evaluation and systematization;
- (b) to promote capacity building in monitoring, evaluation and systematization;
- (c) to develop general principles, procedures, ethical and good practice criteria for monitoring, evaluation and systematization;
- (d) to promote the development and dissemination of concepts, methodologies and tools for monitoring, evaluation and systematization adapted to the cultural diversity of the region;
- (e) to encourage the transparent, participatory and equitable monitoring practice and use of evaluation and systematization among national and international organizations;
- (f) to help to develop the international community of monitoring, evaluation and systematization professionals, and to do this from the cultural and specific experiences of the region;
- (g) to support the development of organizations and national and sub-regional networks of monitoring and evaluation.

Since its inception, ReLAC has considered that a key part of its mission is to influence the decision makers of public policy in the countries of Latin America and the Caribbean, in order that evaluation can be considered a key component in all policies, and can even become a national policy. While initial efforts were oriented to the establishment and strengthening of national networks through the support and guidance of the ReLAC Executive Committee, it was also detected that a weakness in the region was the lack of instances of systematic training of evaluators. These were mostly social scientists, government technicians and actors from different NGOs, who had had a very heterogeneous training experience. In many cases, their training had been learning in practice, without explicit links with training (formal or informal) focused on evaluation.

This diagnosis served as a the basis to start developing a program of postgraduate training in evaluation, which had its origins in the working group on evaluation of members of universities and training institutions, created on the occasion of the first ReLAC conference.

A series of meetings and workshops in different countries led to the development of a curriculum, with specialists from the various academic institutions in charge of each of the program's subjects. This work was strongly supported by the UNICEF Evaluation Office and the Director of the Latin America and the Caribbean UNICEF office, and it was presented at the 2nd ReLAC conference in Bogota (July 2007) as a Virtual Master on Evaluation. Members of ReLAC, who were lecturers and professors in about fourteen universities in the region, had expressed their interest on promoting partnerships with ReLAC, and the inclusion of the evaluation training program in their respective universities. The program comprised an innovative proposal in order to address the socio-political contexts and challenges posed in the region, which arose from the recognition of the need and demand for evaluation professionals in the region, as well as the imbalance in the North-South relationship in matters of development. Therefore, it was critical for the region that training of evaluators takes into account the unique features of the continent.

The program included a clear profile of the evaluator which was sought to train for working in Latin America and the Caribbean, an organized curriculum structure, several teaching and educational developments, as well as features of an institutional organizational framework. Thus, the master's program was directly designed for the development of an enabling environment for evaluation in the region. The main actors whom this program was aimed to train and influence included those responsible in public sector institutions as well as members of civil society and the private sector. The evaluators committed with the program development, many of whom would be its lecturers, were trained by FLACSO-Ecuador³ in a graduate course focused on the methodology and logic of e-learning. As it turned out, the efforts to fund and implement this program did not succeed. However, the coordination of ReLAC with the Training Program in Social and Policy Management, a Graduate Evaluation Diploma developed by FLACSO-Chile, allowed the successful implementation of a face-to-face version of the original curriculum in January 2008, January 2009 and November 2009. Thus, the influence over the national evaluation systems found in these courses has a clear prospect of realization. Currently, many of the

3 FLACSO stands for the Latin American School of Social Sciences, founded in 1957 by the initiative of UNESCO, and created as an international, inter-governmental, regional and autonomous body comprised of Latin American and Caribbean countries. The core objective of the FLACSO is establishing post-graduate programs for the purpose of training new Latin American generations in different fields, within the Social Sciences.

professionals involved in the development of this program believe that its structure and logic is still valid, and it would only require an update, five years later, of its original development.

In summary, the process of development of this graduate program in evaluation involved both a commitment to strengthen an enabling environment for the development of evaluation in the region, as well as strengthening the institutional capacity of ReLAC. This was true from the internal organization of various members of the network, and the joint work, associated with the support given by UNICEF and the relationship with several universities in the region. More recently, the content and methodology of this virtual program has been re-worked as an e-learning program in the framework of the EvalPartners initiative.

One of the most important tasks faced by ReLAC to know the status of evaluation in Latin America and the Caribbean has been the Study of the Demand and Supply of Evaluation Services in the region, made in agreement with the Inter-American Development Bank (IADB). It involved 16 countries, and over 150 interviews with relevant stakeholders related to evaluation in these countries: civil servants, members of international organizations, NGO actors, and academics. The study was conducted in order to provide input for the creation of the CLEAR center in the region, and the results were shared in various international conferences.

Also in line with strengthening an enabling environment conducive to generating a culture of evaluation, ReLAC has sought to serve in the role as facilitator of national networks. This has been done with mixed results, depending on the possibilities of mobilization, contact and communication of the Executive Committee with evaluators in different countries. While so far most of the national networks have not reached a high level of development, at least there are groups of people linked to ReLAC working to constitute Voluntary Organizations for Professional Evaluation (VOPEs) in their countries, while actively participating in the working groups of ReLAC (more information of this is provided in the next section).

The strengthening of the capacities of individual members of the network has been approached from different perspectives. Regional conferences have certainly been a suitable forum for this, by the development of training activities as pre-conference workshops, which have always been evaluated by the participants as being of high quality. The emphasis on approaches that focus on equity and gender have not been absent from the major initiatives of ReLAC,

that is, the instances of pre-conference training, the themes of the conferences, the establishment of working groups with that focus, the sponsorship of forums and workshops addressing such topics, etc. The email list-server usually has various exchanges of information on technical aspects of evaluation methodologies, the presentation of experiences, and the calling for electronic forums.

Similarly, since its inception ReLAC has sought to maintain relationships with other national and international evaluation networks and associations, actively participating in conferences, meetings and forums. In relation to the IOCE, in addition to the active participation in its formation, ReLAC representatives have participated on its Board and worked on several of its initiatives.

Progress and results

In the ReLAC Assembly held after the Third Regional Conference in San Jose (Costa Rica, 2010), representatives of the following national networks participated: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Honduras, Guatemala, Ecuador, Nicaragua, Peru, Dominican Republic, Uruguay, and Venezuela. More recently the Paraguayan Evaluation Network has been integrated to ReLAC. The ReLAC Executive Committee consists of seven people, each of them being member of their respective national evaluation network, and elected by the ReLAC Assembly. This Executive Committee elects internally the Coordinator and Co-Coordinator of the network, and assigns tasks and responsibilities to its members.

The adoption of a legal form was an important mandate of the 2007 Assembly of ReLAC, which would facilitate a higher formalization of the network, while allowing independent management of financial resources (an aspect that has long been supported by Desco, a Peruvian NGO). Finally, the ReLAC 2010 Assembly adopted a legal form with the constitution of an association based in Costa Rica, which must conform to the national regulations of the country. The spirit of building this association was the result of a long process of inquiry about the possibility of different legal figures (in different countries) in order to serve a network as ReLAC. After the initial adjustments to the regulations of the country, we are in the process of adjusting the communication protocol and action of the association with ReLAC network that gave it origin and meaning.

The strengths of ReLAC are its increasing visibility in different forums about evaluation, both in Latin America and beyond, which

is happening at the same time as its recognition by different international organizations and evaluators in the region. Other strengths that can be added are the activities and commitment of the leaders of the working groups, the presence of members of ReLAC at national, regional and international conferences, as well as publications made by them as members of ReLAC.

In the case of a regional network like ReLAC, the networking opportunities are possible and are enhanced through the use of virtual media. This has been clear in ReLAC by its mailing list (relac@gruposyahoo.com.ar), in operation since the beginning of the network, which currently has more than six hundred participants. Through this mailing list information is shared about events, training, consulting, publications, etc., while occasionally it is also a space for debate and discussion on issues related to the world of evaluation. Shortly before the second ReLAC Conference in 2007 the web page www.relacweb.com was set up, which worked both for this and the subsequent conference (Costa Rica 2010) as a public space for information about these events. In early 2010 ReLAC began to make use of a virtual platform for the creation of social websites at noticiasrelac.ning.com. This was created by the dynamics of different activities that could not be addressed or developed from the ReLAC website. In two years the site has surpassed 800 participants, and has options to broadcast events and publicize information. Perhaps the most interesting characteristic of the site is the ability to manage different working groups, which constitute thematic areas where to share knowledge, relevant information, to raise and discuss questions, generate new ideas, opening possibilities for cooperation and sharing experiences. While to participate in the groups you must subscribe to them, the platform allows one to follow the exchanges as a website, which provides open access to anyone interested. On the occasion of the 2010 ReLAC conference, one of the groups turned their discussions and exchanges into a panel and various papers. Currently, the main topics of interest discussed by the working groups of the virtual platform are (in order of relevance for their activities):

- a) Evaluation, Gender and Human Rights: 112 members
- b) Evaluation and Systematization: 145 members
- c) Planning and logic models approaches: 35 members
- d) Evaluation and Educational Policy: 36 members
- e) Evaluation and Organizational Learning: 38 members

Besides the development of workshops aimed at capacity building of the participants in evaluation during the regional conferences, ReLAC has also sponsored seminars and panels focused on evaluation in different countries.

Challenges and bottlenecks

Some of the main challenges have to do with the voluntary nature of the network, in which the evaluators and people interested in evaluation joined voluntarily and *pro bono* (*ad-honorem*). In the case of the Executive Committee, this has usually involved a significant burden of work (especially on the occasion of the organization of the regional conferences), which in several cases has led to overlook their jobs and formal activities (dependent or consulting). One way to deal with this situation has been engaging network members who do not participate in the Executive Committee on specific tasks.

Furthermore, in various Executive Committees constituted to date has been dismemberment, as well as the absence of clear and agreed mechanisms for resolving conflicts and opposing positions. In early 2012 the Executive Committee discussed and updated its internal operating rules in order to facilitate communication, problem solving and decision making. Another weakness is that there is not an accountability demand from the members of the network to the members of the Executive Committee. This is expressed in practices of delegating responsibilities, leaving in its hands the management of the network, without the subsequent request for information as well as offering to carry out tasks and activities. The absence of a membership fee also involves the lack of resources to address major actions.

As noted above, for its trajectory ReLAC is recognized by the regional and global evaluators as a legitimate regional VOPE. Although it is clear from its origins that its character is one of a network of networks, often the actions and stability over time of ReLAC runs independently of the reality of its constituent networks. Some active and committed members of ReLAC have a less intensive or almost non-existent relationship with their national network. In this sense, ReLAC functions as a network itself, as it is evidenced by the individual adhesion of members to its instances of communication (mailing list, virtual platform), without necessarily adhering to their own national networks.

As a regional network ReLAC has not had a direct role in strengthening transparency and accountability of the national governments. Its character as a network of volunteer professionals as well as lower interest in perspective on these issues (as it is absent in thematic groups mentioned above) are factors that explain this situation.

The challenge for ReLAC is to consolidate the achievements made and make progress with other tasks such as the development of evaluation standards, the implementation of education and training initiatives, and enhancing the institutional linkages with governments.

Innovations and lessons learned

- It is very important to have a group of volunteers motivated and committed to the mission and objectives of the network.
- This group of volunteers should be growing in number and diversifying its activities.
- Do not assume that new members have the “know how” about the tasks and ways of acting in the network. This involves considering instances of induction and support in the task (shadowing).
- Continually strive to be efficient and effective using the available communication channels. This implies as a minimum rule to be active and attentive to the use of email as a means of information, discussion and arriving at consensus and /or other forms of decision making.
- Having as an important goal to create partnerships with different actors (government, non-governmental, institutional and individual) and seek to broaden the scope of the network.
- Open channels of input and participation for all members of the network.
- Be generous and strategic, supporting and sponsoring academic events and training in evaluation.
- Maintain the institutional memory of the network without going to extremes.

Next steps

Much of ReLAC's actions have aimed to train the community of evaluators in the region and the establishment of an evaluation culture in Latin America. The purpose of creating a strong culture of evaluation aims to facilitate and improve implementation of policies and programs focused on those most in need, promoting their inclusion as full citizens of their societies. Underpinning this goal requires the development of a strategy that encompasses various initiatives to join those currently ongoing.

That is to say, in addition to deepen in the use of digital tools that facilitate communication between network members (listserve, virtual platform, website), and to continue the training strategies at the conferences, it would be important to recover and implement the work done in relation to the Master in Evaluation, as well as deepen the relationship with other VOPEs of the international context. These actions would point directly to the function of strengthening an enabling environment for the maturation of a culture of evaluation. By this we mean to encourage the creation and/or strengthening of national evaluation systems that promote the practice of evaluation of programs and policies, increasing transparency, accountability, and learning about them. This will involve working both in creating this environment to enhance the demand as well as the supply of evaluation, promoting the training of evaluators in both virtual and semi-present contexts.

An example in this regard is the articulation of actions in conjunction with CLEAR-Latin America, which has referred to ReLAC as a major player in its training proposals. Along with this center and the PREVAL, it has provided sponsorship to an Evaluative Research Symposium to be held in Santiago de Chile in January 2013.

On the other hand, the planning of the next regional conference for 2013 is on track, maintaining the regularity of a conference every three years. The ReLAC conferences are the focus where the majority of the network actions converge, and also where the bulk of the discussion of the working groups is oriented.

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BRAZIL: BRAZILIAN MONITORING AND EVALUATION NETWORK (BMEN)

BRAZILIAN MONITORING AND EVALUATION NETWORK. CREATION, DEVELOPMENT AND PERSPECTIVES

Marcia Paterno Joppert and Taiana Fortunato Araujo

Management Committee Members¹

Background

The Brazilian Monitoring and Evaluation Network (*Rede Brasileira de Monitoramento e Avaliação*) is an initiative that continues a previous movement started in 2003. It was launched in 2008 as a chapter of the Latin America and the Caribbean Monitoring and Evaluation Network (RedLaCME), under the leadership of the João Pinheiro Foundation (JPF) – a Governmental School of the Minas Gerais State Government, the Inter-American Development Bank (IDB), and the World Bank. Its launch was recognition of the existence of a considerable critical mass for this topic, the lack of forums to exchange and organize experiences, and the mobilizing effect of the Fourth International Conference of the Regional Network, which took place in 2008 and was hosted in Belo Horizonte. It used the gathering in Brazil of different actors in the topic to mobilize a side event during the conference, which led to the foundation of the Brazilian Network.

In addition to the JPF, the IDB, and the World Bank, various representatives of international and national institutions interested in the topic attended the inaugural meeting. These institutions included the United Nations Development Programme (UNDP-Brazil), SEADE Foundation, the Brazilian Northeast Bank, Itaú Social Foundation, Unibanco Institute, Ministry of Social Development and Fight Against Hungry, The Brazilian Court of Audit (TCU), and Ceara State Planning Bureau.

1 The authors want to thank the other Management Committee members for their comments and suggestions: Alcides Gussi, Ana Maria Alves Carneiro da Silva, Breyner Ricardo de Oliveira, Glaucia Macedo, Guilherme Pereira, Leonardo de Oliveira Santos, Lilia Belluzzo, Marcos Falcão Gonçalves, Paula Montagner, Thomaz Chianca, Veronica Ferreira Machado and Victor Maia Senna Delgado

In June 2009, the 1st BMEN National Conference was held also in Belo Horizonte, MG, hosted again by FJP. Nevertheless, at that time there were no implemented technological tools that allowed the realization of the core activity of any network: articulation, communication and exchange of experiences and knowledge. It was then that a new partner, the Brazilian Evaluation Agency, came to support the initiative, customizing and creating the web platform² and finally providing the website of the network which was launched in June 2009. This website (<http://redebrasileirademea.ning>) operates as a social network. Thus began a long and patient process of animation: attraction of new members (institutions and individuals) and dissemination of information and knowledge, which became the basis of interest and articulation among them.

Some of the founding principles of the BMEN were decentralization, openness, and the low cost of implementation, as no in-kind resources were being invested. In its first year, the BMEN had more than the initial 3 institutional champions. A number of institutions, including the State Statistics and Economics Foundations, public banks, and international organizations supported the initiative. Generally speaking, the representatives of these institutions in the network, in addition to serving as focal points, also represent individuals committed to these issues in their respective institutions.

A second important principle for the network is its openness. In an effort to maximize the possibilities of co-operation among different stakeholders, the network offers membership to individuals or institutions and to other networks, which translate into the membership's freedom (either personal, institutional, or of other networks) to maximize the possibilities of cooperation among different stakeholders.

Finally, a third and important principle was the effort to reduce losses to a minimum if the initiative failed. The initiative's existence is justified only if it is useful and capable of showing its value, which has happened through the growing membership, increased number of visitors, and growing engagement.

The Management Committee is actually composed of 12 members representing public and private institutions and consultants: The Northeast Brazilian Development Bank (BNB); National Institute of Metrology, Quality and Technology (INMETRO); The Brazilian Development Bank (BNDES); The Brazilian Evaluation Agency; The

2 Based on Ning Technology

Data Analysis State System Foundation – SEADE (São Paulo State); The Ministry of Social Development and Fight against Hunger (MDS); The João Pinheiro Foundation (FJP) – Minas Gerais State; The Ceara Federal University – Master in Public Policies Evaluation (MAPP/UFC); The Ouro Preto Federal University; The Office of Strategic Priorities of the State of Minas Gerais; Study Group on Organization of Research and Innovation (GEOPI) of Campinas University (UNICAMP); Rizoma Planning M&E Consultancy; and Thomaz Chianca (as an international independent consultant).

Strategy and implementation

Based on the conceptual framework for national evaluation capacity development³, BMEN has contributed to:

- Strengthening an enabling environment: by putting together a community of 3,660 people⁴ (half of them public servants from Federal, States and Municipal governments); by creating spaces for debates; by promoting discussions about which capacities Brazil has and which ones have to be developed, by disseminating knowledge and good practices; by evolving a professional association.
- Developing/strengthening individual capacities to conduct credible and useful evaluations, by:
 - 1) Promoting mini-courses and workshops (during the Annual National Seminars), as detailed below:

<i>Mini-courses / Workshops</i>	<i>II Annual Seminar</i>	<i>III Annual Seminar</i>	<i>IV Annual Seminar</i>
Logical Frameworks and its importance in Program Evaluation – Victor Maia Senna Delgado (JPF)	40		35

3 The conceptual framework is presented in the article “Moving from policies to results by developing national capacities for country-led M&E systems”, available in the book “From policies to results. Developing national capacities for country monitoring and evaluation systems” available at <http://www.mymande.org/content/policies-results>. The article is from page 22 to 40, and the framework from pages 28-39

4 Up-to-dated in November 15, 2012

<i>Mini-courses / Workshops</i>	<i>II Annual Seminar</i>	<i>III Annual Seminar</i>	<i>IV Annual Seminar</i>
Managing for Results in Public Administration (Humberto Martins – Publix Institute)	50	30	
Social Programs Monitoring and Evaluation – Basic Concepts, Tools, Indicators and Surveys – Paulo Jannuzzi (MSD)		40	135
Workshop: Real World Evaluation – Jim Rugh		35	
Mini course: Quantitative and qualitative methods of evaluation – Luis Fujiwara – UN-Women		30	
Workshop: Mixed Methods Evaluation: Opportunities and Challenges – Michael Bamberger and Thomaz Chianca			45
Workshop: Strengthening the culture of monitoring, evaluation and learning in civil society organizations – Rogério Renato Silva and Daniel Brandão (Move Social)			35
Research and development impact assessment evaluation – Adriana Bin (UNICAMP), Edilaine Camillo (UNICAMP) and Andre Rauen (INMETRO)			56
Total number of participants	90	135	306

- 2) Disseminating all the opportunities for capacity development in Brazil and abroad: through the “Capacity Building” forum⁵, 41 opportunities were disseminated.

5 see: <http://redebrasileirademea.ning.com/group/formacao/forum>

Future Prospective

- A partnership with the Inter-American Institute for Economic and Social Development (INDES/IDB) and Municipal National Confederation (CNM) is being negotiated to translate and adapt the content of the course “Management for Development Result in Sub-National Governments”⁶ to be offered for the public managers of municipal and state levels.
- A partnership with the EvalPartners Initiative is being negotiated to design a 10 unit e-learning course for civil society (NGOs and municipal councils).
- An articulation between several stakeholders is being made for the creation of a Regional Center for Learning on Evaluation and Results – CLEAR⁷ in Brazil
- The BMEN is also involved in translating selected evaluation textbooks into Portuguese

In addition to this, BMEN has promoted, since 2011, several meetings of its Management Committee to build a Strategic Plan and coordinate its Annual Seminar (the 4th one was held in Rio de Janeiro between 13 and 15 of August 2012).

Bottlenecks and challenges

- **To have a professional and sustainable association supporting the BMEN:** as stated in the 5th Annual Meeting of the BMEN, this initiative would be very important to: advocate or support national evaluation systems and policies, define principles and standards, build a common language, influence the existence of a legislation and/or policies which institutionalize the independence, credibility and utility of evaluation; strengthen demand on how to contract evaluation studies; support capacity development initiatives; leverage a culture of M&E; and contribute to evaluative thinking.
- **Raise awareness of the parliament and the media** about the importance of bringing to society this kind of knowledge and of the **public administration** to incorporate these values and practice to the policy cycle.

6 see: <http://www.iadb.org/en/indes/outcome-based-management-in-the-development-of-subnational-governments,3382.html>

7 <http://www.theclearinitiative.org>

- **Articulate the processes of Capacity Building**, making the supply correspond to the demand.

Progress and results

Four national seminars, a national journal (Brazilian M&E Journal⁸), 10 one-day courses and workshops promoted during the annual seminars have been held, plus the dissemination of a great deal of information, knowledge, capacity building and job opportunities in the area. Also many individuals have participated in regional networks representing the Brazilian initiative⁹.

Key enabling factors

- The BMEN is totally open and attracts all the stakeholders interested in monitoring and evaluation, not only public servants or evaluation experts, but also persons interested in all the methodological approaches.
- It is not a formal institution, hampered by bureaucracy, but a common space where people can share information and knowledge.
- It is politically neutral and has a diverse Management Committee, protecting it against any co-optation.

The Management Committee believes that these characteristics attract all kinds of partners who have common objectives bringing legitimacy to the initiative.

Innovations and lessons learned

- A network initiative has to have a champion: someone who starts and makes it sustainable.
- The use of an adequate technological platform is important, but not enough – continuous animation and communication skills are fundamental. It is also very important to promote face-to-face meetings and events.

8 <http://apl.mds.gov.br/ojs/index.php/RBMA/index>

9 Red de Seguimiento, Evaluación y Sistematización de América Latina y el Caribe (ReLAC) and Red de Monitoreo y Evaluación en América Latina y el Caribe (RedLaCME)

- The best design for a network is the distributive¹⁰ (the one that allows “nodes” to relate to each other without going through a “central brain”).
- Be patient and persevering in attracting new supporters and partners: networks are long-term initiatives. A strategy to attract members and partners is very important.
- Formal leadership arrangements must be well thought out and appropriate to the objectives and activities of the network – balanced representation of all stakeholder groups in the leadership system that determines the strategic direction of the organization and succession processes.

Next steps

The Management Committee is building together a strategic plan based on the Balanced Scorecard method. We have defined objectives for four perspectives: society, clients, internal processes and “learning and competencies”, as listed below:

1) Society’s Perspective

- Improve society’s participation in the formulation of policies, plans, programs and projects and their M&E.
- Incorporate M&E in the processes of planning and formulation of policies, programs and projects.
- Improve the quality of M&E.
- Improve communication of the results of M&E.
- Contribute to the effectiveness of policies.

2) Clients’ Perspectives

- Expand the use and interaction with the platform.
- Balance the representativeness of the Network (in terms of key actors, regions, other countries and sectors).

¹⁰ See Paul Baran Diagram.

- Articulate and promote training for different actors (managers, evaluators, NGOs representatives, counsellors, – members or not).¹¹
- Improve the competencies of evaluators.

3) Processes' Perspectives

- Improve the identification and the dissemination of content (knowledge, news, events, job and training opportunities).
- Improve communication with members in order to open the Network to a wider public.
- Promote an environment of face-to-face interaction (national and / or regional).
- Manage virtual environment interaction between members.
- Support publications.
- Interact with other actors and national and international networks.

4) Learning and Competencies

- Improve management capacity: governance, strategic planning, coordination, working groups, criteria for funding and application of resources.
- Develop ability to identify demands for knowledge and offer it for the various stakeholders.
- Develop ability to animate the Network.
- Enhance leadership in the development process of the M&E area, communication skills and technology skills.

11 Capabilities to: understand evaluation, specify and contract evaluations, perform evaluations, analyze products and results, formulate indicators, commission, disseminate.

CANADA: CANADIAN EVALUATION SOCIETY (CES)

CANADIAN EVALUATION SOCIETY: WELL-ESTABLISHED BUT STILL CHANGING

Martha McGuire

CES Past-president and CES Representative to IOCE

Background

The advent of CES's first international conference in 1985 on "Exploring the Uses and Contributions of Evaluation," evokes a nostalgic image from April 14, 1981. That day, seven practitioners of an emerging art applied for Letters Patent from Canada's Minister of Consumer and Corporate Affairs for incorporation of CANADIAN EVALUATION SOCIETY / LA SOCIÉTÉ CANADIENNE D'ÉVALUATION. The founders:

- *Mr. Alan Cohen*, Department of Sociology, University of Western Ontario
- *Dr. Alan Gilmore*, Co-ordinator for Program Evaluation, Office of the Auditor General of Canada
- *Mr. Alan Gratias*, Director of Program Evaluation, Department of Indian and Northern Affairs
- *Dr. Gary Miller*, Research Department, Hamilton Psychiatric Hospital
- *Mr. Burt Perrin*, Program Evaluation Officer, Ministry of Culture and Recreation of Ontario
- *Dr. Jack Santa-Barbara*, Executive Director, Youtec Consulting, Toronto
- *Dr. Jack Williams*, Director of the Health Care Research Unit, Faculty of Medicine, University of Toronto

CES was established through the passion of a small group of dedicated individuals who recognized the importance of establishing the credibility of evaluation. The **objectives** and mandate were and to a great extent still remain:

- To provide a forum whereby program managers, administrators, policy makers, consultants and university professors can discuss the theory and practice of evaluation in Canadian society.
- To promote the practice of high quality evaluation in public and private programs throughout the country.
- To develop the theories, standards and practices of evaluation.
- To promote training programs in planning the design, strategy, methods, analysis and application of results for all types of evaluation.
- To provide a forum of exchange on policies, practices, applications and sources of funding for evaluation.

Its values are:

Inclusiveness. Members value the diversity inherent in the communities in which they work and strive to ensure their methods are appropriate to the culture and context of these communities. As an organization, CES reaches out to ensure the diversity of the Canadian population is reflected in its membership.

Social Commitment. Members participate on a voluntary basis and choose to give freely of their time and knowledge as a positive and essential expression of social commitment to evaluation and societal benefits from evaluation.

Accountability. Members accept responsibility for their actions as they relate to evaluation practice and activities conducted on behalf of CES.

Transparency. Members openly disclose values, purposes, expectations, actions and conclusions while providing complete and honest information. (*PDP Report Jan'12*)

Wisdom. Members respect the ability to make good judgments based on what is learned from experience.

There are now 15 members on our governing board, with representation from across Canada including one representative from each of our 10 chapters, a President, Vice-President, Vice-President of

the Professional Designation Program, and Treasurer. There are three standing committees:

Administration Committee: This committee is responsible for overseeing all administrative matters of the Society, including but not limited to, by-laws, elections, finance, legal and membership registrations as well as for making recommendations to Council based on its review. Elections and electronic voting may be coordinated with Officers of the Council (i.e. Past President) as necessary.

Member Services Committee: This committee is responsible for overseeing all of the Society's communications and publications as well as membership recruitment and service activities. This includes planning and managing all services provided to Chapters and individual members by CES at the national level, the *Canadian Journal of Program Evaluation* (which is celebrating its 25th year), the Case Competition, and the CES website. It is also responsible for designing, implementing and monitoring membership information systems.

Professional Development Committee: This committee is responsible for overseeing all of the Society's professional development activities, ethical guidelines, standards and workshops. Development and implementation of the Essential Skills Series workshop curriculum and facilitator's manual have been a major focus for this committee. This area is linked with the responsibility and the ongoing professional credentialing, which is overseen by the Vice President of Professional Designation Program.

These standing committees have the authority to strike appropriate subcommittees, which aid in the discharge of their duties.

The presence of representatives of provincial chapters allows the CES to be well informed of the challenges of evaluation practice in the various provinces, to promote the development of collective strategies on common issues and supporting chapters on issues that are their own.

It therefore falls to the representatives of chapters to be proactive to bring to the attention of the CES Board their regional issues. These representatives also share experiences and learn from each other. It should be noted that two provincial chapters have opted for greater autonomy by becoming legally incorporated (*Société québécoise d'évaluation de programme* – SQEP; and Alberta and North-

west Territories Chapter), while the remaining members maintain their legal status under CES.

Other elements which are implemented and or supported by CES include:

The ***CES Fellowship*** consists of long standing members of the CES, who receive a “Fellow” designation, and can be appointed to the CES Fellowship Council. This council is consulted on matters pertaining to the best interest of the Canadian Evaluation Society and evaluation in Canada. The National Council defines the procedures in which the Fellowship operated.

The Canadian Evaluation Society Educational Fund (CESEF) which is an independent organization that was originally created by the Canadian Evaluation Society in 1990 and reorganized in 2005 to improve national capacity for evaluation through educational activities. In 2006 it became officially registered as a Canadian Charity and making a gift to CESEF is encouraged.

CESEF’s mandate is to provide scholarships, awards, and educational opportunities to individuals wishing to further their knowledge within the field of program evaluation. There is an agreement between CES and CESEF and a Joint Working Group exists to jointly decide on award guidelines, eligibility, peer review, funding, and selection of peer reviewers and approval of recommendations put forward by the expert panel. CES communicates with award winners regarding travel and registration to the annual conference, reimbursement for student expenses and presentation of the submission at the conference. Both organizations jointly manage the Student Case Competition at the national conference.

The Student Excellence Advancing Evaluation Knowledge Award (SEEK) is a joint initiative of the Canadian Evaluation Society (CES) and the Canadian Evaluation Society Educational Fund (CESEF) designed to foster student engagement in evaluation, profile evaluation-related work conducted by students studying within Canadian post-secondary institutions and advance excellence in student evaluation projects. The Student Excellence advancing Evaluation Knowledge (SEEK) Award builds on the previous Student Paper Contest and recognizes excellence contributing to the advancement of evaluation theory and/or practice by students in Canadian post-secondary institutions.

Although CES is a bilingual organization, its Council meetings are conducted in English. Its annual conference provides sessions in both English and French with simultaneous translation.

Bilingualism remains an important issue in the daily operation of the CES and requires continual vigilance. There is an effort to maintain a realistic balance between the commitment to bilingualism and the costs of translation as well as the volunteer effort this requires from the Francophone community.

Strategy and implementation

Strengthening an enabling environment

CES seeks to influence:

- Federal government
- Provincial governments (chapter responsibility)
- Evaluators
- Those who engage evaluators

Local chapters contribute substantially through their advocacy activities to creating an environment that supports quality evaluation. Because much of our membership works within government, there are a number of activities that are not directly related to the CES, but reflect the CES' position in regards to quality evaluation. CES also has representation on the Joint Standards Committee.

Enhancing individual capacities

Canada has the technical capacities to incubate quality evaluators through its universities. The Canadian University Evaluation Education Consortium is comprised of 12 universities that provide graduate level education in evaluation. CES provided some initial funding to help the group get started and continues to have its Chair of the Professional Development Committee sit on the group. The intent is for these universities to provide courses that are transferrable across all 12 universities, making it easier for students to obtain a graduate level education in evaluation.

CES supports the development of quality evaluators through its Professional Designation Program (PDP), which provides credentialing for evaluators that meet certain criteria and whose application is reviewed by two members of a credentialing board. The process occurs on-line and is open to any member

of CES. Credentialed Evaluators are required to participate in at least 40 hours of professional development every three years in order to maintain their certification. As of May, 2012 there were 103 Credentialed Evaluators (CE).

Professional development opportunities are provided through:

- webinars at the national level
- workshops, lunch-and-learns, breakfast sessions at the chapter level

The annual national conference provides significant professional development opportunities through workshops, presentations and networking.

CES also provides access to grey literature through its website (www.evaluationcanada.ca).

Strengthening equity-focused and gender sensitive evaluation systems

CES has a Diversity Committee which is interested in equity and gender sensitivity. One of its first activities was to determine the diversity of the evaluators in Canada. Future plans include looking at mechanisms to support diversity of CES membership.

Strengthening our own institutional capacity

The organization is now focusing on strengthening itself so that it uses its volunteers better and has greater capacity to serve its members. In the past year, CES has focused on updating its strategic plan and had external reviews of its financial monitoring, information technology and organizational systems, which resulted in a number of recommendations for change. It is now in the process of developing a plan to implement the recommendations, including the hiring of a dedicated staff person.

Bottlenecks and challenges

- The voluntary nature of the organization is both a strength and a challenge. CES has strong participation from its membership, with some of its members providing substantial support such as developing and maintaining our website in addition to the time spent by Council members. CES has reached a point where it requires more sustained support in order to make the most of its volunteers.

- Geographical size of Canada, with huge disparity in population distribution.
- Finances are always an issue. CES gets its money primarily from membership fees, PDP fees and conferences. While the membership is growing, the conferences provide variable funding. At this point CES needs to look to other sources of sustainable funding.

It is difficult to limit our challenges with only three! The biggest challenge is that it is always growing and evolving

Progress and results

It is difficult to outline all of the progress and results over the past 30+ years. At this point CES is fairly strong with advocacy – being known, heard and respected:

- With the federal government at the national level
- With the provincial governments at the chapter level

And with representing the evaluation community:

- On the Joint Standards Committee
- On the IOCE board/EvalPartners
- With the Consortium of Universities for Evaluation Education

Key enabling factors

- Its strong volunteer base
- It was the first VOPE to be formed¹, and so is a well-established organization, recognized by government, NGOs and evaluators
- Its biggest enabling factor is that it is always growing and evolving

Innovations and lessons learned

Keep your eye on the details because that is where the devil is. In the long run it means that you do not get caught up in crisis management. Following are some key areas to keep an eye on:

- Strategic direction
- By-laws and policies

1 Although AEA's predecessor organizations did predate the formation of CES

- Relationships with chapters/partners
- Requirements for your organization under the laws of the country
- Organizational infrastructure
- IT infrastructure
- Monitoring systems

Next steps

Within the mandate of the CES objectives and values, its current strategic priorities are:

- Strengthening our organizational infrastructure
- Strengthening professional development by maintaining existing vehicles and developing new opportunities such as webinars
- Increasing our advocacy activities for the betterment of evaluation
- Strengthening our strategic partnerships

For the past year, there has been an intensive focus on strengthening our organizational structure and this is likely to continue at the same level for at least another year. This will ensure that CES is in a position to give adequate attention to professional development, advocacy and our strategic partnerships.

Organizational Infrastructure – By June, 2015, CES will have completed infrastructure improvements to support the future sustainability of the Society and its contribution to the field of evaluation in Canada and internationally.

Professional Designation – By June, 2015, CES will have processes in place to report on member, chapter, national, and international involvement in professional development and the PDP program and the degree to which the field of evaluation has changed.

In close partnership with SQEP and AfrEA, CES has contributed to the development of the EvalMentors initiative under the umbrella of EvalPartners in order to support capacity building at both the individual, organizational, academic and government levels. EvalMentors has three major projects: 1) To develop / strengthen of academic curricula and professional development; 2) To support the launch of the African Evaluation Journal and the ability of African evaluators to publish; and 3) To strengthen the institutional capacity of African VOPEs.

In collaboration with SQEP, CES involves its platform, its committees and its members' expertise for the realization of mentoring activities, technical support and expertise transfer, and this in a perspective of empowerment and autonomy within a realistic time-frame.

CÔTE D'IVOIRE : RÉSEAU IVOIRIEN DE SUIVI ET D'ÉVALUATION (RISE)

PROGRESSING AND SHARING EXPERIENCE IN DEVELOPMENT EVALUATION

Samuel Kouakou

*Chairman Thematic Group on Agriculture,
Food Security, Environment and Sustainable Development
Côte d'Ivoire*

Context

Like many other countries, Côte d'Ivoire has joined in the movement of promoting a culture of Monitoring and Evaluation. Though it is a function that is essential to ensure the sustainability of development actions, it has long been neglected in our country. Aware of the problem and urged by certain partners in development, professionals and practitioners of all ranks of the public administration, NGOs, training and research institutions, the private sector, etc., have gathered to reflect upon the issue of Monitoring and Evaluation.

It is within this framework that, in 2002, the idea of creating a National Monitoring and Evaluation Network germinated.

The idea took shape in 2004 with the creation of a National Monitoring and Evaluation Network, dubbed *Réseau Ivoirien de Suivi et d'Évaluation (RISE)*, which was formalised in 2008.

The first AfrEA conferences, which hosted several specialists and practitioners of Monitoring and Evaluation from Africa and particularly from Côte d'Ivoire, revealed that it was necessary for Côte d'Ivoire to durably reinforce its evaluation capacity. The creation of a Monitoring and Evaluation Network or Association became, as in Niger, Kenya and South Africa, the subject of many consultations, which took place in Abidjan with the technical and financial support of the local UNICEF field office. The Directorate of Coordination, Control and Evaluation (DCCE), which is answerable to the Directorate General of Planning of the Ministry of State, Ministry of Planning and Development, was the kingpin at the government level for

the promotion of RISE. This Central Management furnished RISE with a secretariat during several years.

The different consultations made it possible for the first meetings to be scheduled, for an organisational form to be conceived and for statutory texts to be devised.

The Constituent General Meeting held on 25 May 2005 under the presidency of the Director General of Planning and with the effective presence of the representatives of the local UNICEF field offices, appointed an Executive Committee of eleven (11) members responsible for polishing the texts, managing RISE during the transition period and organising an elective General Meeting for setting up governing bodies.

The Constituent General Meeting was attended by over eighty-three (83) people, all professionals and practitioners of Monitoring and Evaluation. At this occasion a special address was made to honour the six (6) members of the ad hoc committee whose work had led to this important meeting being held.

Within the framework of the prerogatives of the Executive Committee, a workshop was held on 1 June 2006 at the National School of Statistics and Applied Economics (*ENSEA*) of Abidjan to officially launch the activities of RISE. It concerned the dissemination of the findings of the Executive Committee, the establishment of the body of RISE and the adoption of the African evaluation standards published by AfrEA.

The first elective General Meeting of RISE took place on 29 October 2008 and led to the adoption of the list of thematic groups.

A ceremony organised on 7 October 2010 implemented the thematic groups, whose presidents were elected on the same day.

RISE is a formal non-governmental thinking group. It is a non-political, non-denominational, non-profit organisation. It regroups researchers, trainers and actors on the ground responsible for Monitoring and Evaluation who advocate the function of M&E and the need for capacity building in that area in Côte d'Ivoire.

RISE is led by a Coordination Committee whose President is also the President of the Network. The Coordination Committee is a management and administrative body of RISE. It leans on a Permanent Secretariat which is in charge of the day-to-day running of the Network.

The Coordination Committee comprises:

- A President
- A Vice President
- A General Secretary
- A Deputy General Secretary
- A Secretary of Finances
- A Deputy Secretary of Finances
- The Scientific Committee Coordinator

Strategy and implementation

Since the Network was implemented, its activities have included:

1. Think tanks on given themes
2. The exchange of documents concerning M&E
3. Experience sharing

In 2005 RISE organised a workshop to disseminate the findings of the 3rd conference of the African Evaluation Association (AfrEA) which had taken place on 4 December 2004 in Cape Town, South Africa. The African evaluation standards were presented at the meeting.

Within the framework of a framework for reflection on and the promotion of Monitoring and Evaluation, and in conformity with its 2009 action matrix, RISE organised a workshop on 11 August 2009 to validate its website and logo projects and to disseminate the findings of the 5th conference of AfrEA held in Cairo (Egypt).

August 2010 was marked by the study that was carried out to assess the national evaluation capacity in Côte d'Ivoire. The diagnostic study was an initiative run by the Ministry of State, Ministry of Planning and Development, with the financial support of UNICEF. It came after the diagnostic study of the institutional framework of national evaluation practice which had been carried out in 2008 within the framework of the elaboration of the National Control, Monitoring and Evaluation Strategy (*SNCSE – Stratégie Nationale de Contrôle Suivi Evaluation*). The study is in direct line of the pilot studies already carried out within some countries of Central and West Africa with a view to preparing a global plan for reinforced sub-regional evaluation capacity building.

Within the framework of the promotion of Monitoring and Evaluation in Côte d'Ivoire, the RISE organised from 21 to 23 June 2011 at the National School of Statistics and Applied Economics (*ENSEA*) a training workshop on Results Based Monitoring and Evaluation, in co-operation with the Côte d'Ivoire-UNICEF 2010 Cooperation Programme. This meeting gave participants the opportunity to familiarise themselves with the practice of Results Based Management (RBM).

The first meeting of the new season of RISE took place on 6 March 2012. It created an opportunity to review the achievements of 2011, to disseminate the findings of the 6th Conference of AfrEA held in Accra and to validate the 2012 action matrix as well as the revitalisation plan for the Thematic Groups.

In summary, since it became a formal structure, RISE has been involved in:

- A study on the national evaluation capacity of Côte d'Ivoire, financed by UNICEF (August 2010)
- The annual evaluation of Government Action (from 2008)
- The annual evaluation of the Annual Work Plans (AWP 2009)
- The elaboration process of UNICEF's Annual Work Plans (AWP 2010)
- The elaboration and validation of the module on the "Prospective-Planning-Programming-Budgeting-Monitoring and Evaluation" (3PBME) chain of Côte d'Ivoire in 2011
- Training on the use of SIGSUP (software for managing development projects financed by the UNFPA) in 2010
- The training of members and actors of development in the techniques and methods of Results Based Monitoring and Evaluation in June 2011
- The elaboration process of the National Development Plan 2012-2015 (*PND – Plan National de Développement*)
- The elaboration process of the National Agricultural Investment Programme 2012-2015 (*PNIA – Programme National d'Investissement Agricole*)
- The elaboration and update of numerous projects, the majority of which are awaiting funding

- The evaluation of the ongoing development projects, in cooperation with the technical ministries
- The activities during the National Population Days (*JNP – Journées Nationales de la Population*) in 2010
- The mid-term evaluation of the project for securing rural land ownership in Côte d'Ivoire
- The terminal evaluation of the TANDA Rural Development Project

In its strategy and in the implementation based on the conceptual framework of the national evaluation and development capacity, RISE is seeking to influence its statutory members, the government and its institutions, the technical and financial partners, the decentralised structures, the NGOs and the training structures.

The following actions need to be carried out:

- 1) The institutionalisation of the statutory meetings of the Executive Committee (e.g. by elaborating a timetable of the periodical meetings, by monitoring the effectiveness of the recommendations resulting from the meetings, etc.)
- 2) The reinforcement of the governance of the Network through the institutionalisation of a results-based culture (e.g. through the monitoring of the actual implementation of the action plans of each thematic group and the commitments of the action programme of the Coordination Committee)
- 3) A visit to the main technical and financial partners present in Côte d'Ivoire, in order to present the Network and to establish technical partnerships
- 4) The development of a production culture through the fostering of competition between the Thematic Groups
- 5) The elaboration, validation and introduction of consensus Monitoring and Evaluation modules in the initial training curricula of schools leading to employment in the public administration
- 6) The development of evaluation into a profession
- 7) The creation of an independent national secretariat responsible for the evaluation of public policies

- 8) The support of the Government Action Matrix (MAG – *Matrice d'Actions Gouvernementales*) according to the principles of Results Based Management (RBM)
- 9) Contributing to the monitoring of the sectorial Medium Term Expenditure Frameworks
- 10) Bringing the government to adopt budgeting based on the results of development
- 11) Instituting quarterly training days for civil servants from the social ministries
- 12) Assisting the technical ministries in the elaboration of training programmes
- 13) Helping make mandatory the dissemination of the knowledge acquired during training
- 14) Encouraging the introduction of a National Evaluation Day
- 15) Elaborating and making the government adopt a declaration of intent with the aim of allocating a part of the ministries' budget to the activities of Monitoring and Evaluation
- 16) The proposal of a community-based monitoring approach, to be systematically integrated into the development interventions directed at communities
- 17) The proposal of an information and immersion day on Monitoring and Evaluation aimed at some specialised parliamentary groups and other local elected officials
- 18) Supporting the government's efforts towards decentralisation through the capacity building of the State's decentralized structures.

Constraints

The main challenges and problems faced included:

- The insufficiency of financial resources for carrying out all of the activities
- The limits of voluntary work, which did not allow continuity in the tasks that were carried out by the members of the Coordination Committee

- RISE's weak national anchoring, as well as the fact that it is not called upon by the government or by the partners in development to carry out evaluations at a national level

Progress and outcomes

RISE has made a lot of progress in terms of exposure. It has gained official recognition by the government and is present at all the major meetings organised by AfrEA. The latest outcome to date was the prequalification of RISE for the national Associations competition organised during the 6th conference of AfrEA in Accra in January 2012.

RISE has a detailed Business Plan for 2012 and, especially, a web-page on the LinkedIn social networking website entitled "*Réseau ivoirien de Suivi et d'Évaluation/ Ivorian Monitoring and Evaluation Network*", to keep in better contact with its members and other international Networks and Associations. Thanks to this link in LinkedIn, many internationally renowned evaluators have contacted RISE, and many others living outside of the Ivory Coast have asked to join the Network from their country of residence.

Finally, RISE participated in the 10th Biennial Conference of the European Evaluation Society (EES), which was held in Finland from 1 to 5 October 2012. This activity has confirmed the presence of RISE in major international meetings on evaluation. It will be one more experience that will surely be capitalised upon.

Essential factors

The three key factors which allowed RISE to obtain current results were:

- The technical and financial support of the local UNICEF field office
- The institutional support of the Directorate of Coordination, Control and Evaluation (DCCE), Directorate General of Planning of the Ministry of State, Ministry of Planning and Development, which provided RISE with a Secretariat until it was formalised
- The strong motivation of most of its members, who are always keen to promote and professionalise the activity of evaluation

Innovations and lessons learned

Voluntary Organizations for Professional Evaluation (VOPE) that want to be well organised and last over time need to have determined people with a vision centred on the extension of evaluation. The technical and financial support of partners is important if the activities of the Association or Network are to be able to start off, considering the absence of resources during the first few years. Technical support from the government is also essential. Indeed, the technical and logistical support provided by the Ivorian government (e.g. technical Secretariat, offices, etc.) allowed the creation of RISE. Government support was made effective through the technical and logistical support brought by the Directorate of Coordination, Control and Evaluation (DCCE) of the Ministry of State, Ministry of Planning and Development.

In order to ensure continuity in its activities, a Network or Association needs to have a permanent secretariat. However, it must first make sure it has the financial resources to hire the staff.

Finally, only a strong Network with adequate resources and the support of a government structure such as the Ministry of Planning in charge of the conception of the national development Plan can bring the Government to elaborate and adopt a policy of promoting Monitoring and Evaluation or to get the Ministries and Institutions of the State to allocate a budget to the activities of Monitoring and Evaluation.

Next steps

In summary of the detailed actions listed above, **at an organisational level** there will be a need to:

- Increase computer equipment and consumables;
- Increase office material and office supplies;
- Ensure the creation, hosting and updating of the website;
- Support the publication of the findings of the thematic groups that meet the quality standards.

At a national level there will be a need to:

- Encourage the introduction of a National Evaluation Day
- Elaborate and make the government adopt a declaration of intent with the aim of allocating a share of the ministries' budget to the activities of Monitoring and Evaluation

- Propose a community-based monitoring approach, to be systematically integrated into the development interventions directed at communities
- Propose an information and immersion day on Monitoring and Evaluation aimed at certain specialised parliamentary groups and other local elected officials

At a sub-regional level:

The foundations for a sharing of experience between the VOPEs of the Economic Community of West African States (ECOWAS) were laid during the 6th conference of AfrEA in Accra. Specifically, RISE is in contact with other national Networks and Associations to share experiences and to build the capacity of their members.

EGYPT: EGYPTIAN RESEARCH AND EVALUATION NETWORK (EREN)

EVALUATION IN REVOLUTION: TOWARDS THE ERA OF POSITIVE CHANGE

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Background driving forces of EREN and its historical development

Despite high levels of economic growth over the past few years, development of the political system, and relative improvements in many sectors such as health, education, and water and sanitation, the living conditions for the average Egyptian remain poor. Admittedly Egypt's liberalization policies have yielded mixed results. Extreme poverty increased from 5.4% to 6.4% between 2005 and 2008, and the households who live below the national poverty line are estimated to be 18.9% of the total population. Various measurements of *disparities and inequality* have risen in the last 3 years. Although spending on grants, subsidies and social benefits account for around 26% of the government expenditure, benefits do not reach the poor proportionally. The large failure to share this income with the people has convinced the latter that the latest policies and reforms have failed. According to the U.N. Human Development Index, Egypt ranks 101 of 169 countries. Although the 2010 HDI value reaches 0.659, its inequality adjusted value only reaches 0.449¹. Furthermore, social and political pressures, added to inherited cultural customs and distorted perception of religion, all sustained the exclusion and marginalization of women, with special emphasis on the public sphere.

1 The IHDl accounts for inequalities in HDI dimensions by "discounting" each dimension's average value according to its level of inequality. The IHDl is the actual level of human development (accounting for this inequality), while the HDI can be viewed as an index of "potential" human development (or the maximum level of HDI) that could be achieved if there was no inequality.

With the series of crises that have been shaking Egypt during the previous decade – financial and economic, plus increase of poverty and disparities, shortage of food and energy as well as political unrests – emerged the urgent need for stronger systems that address transparency, efficiency and accountability. In addition, both the Government machinery and the civil society lack the minimal quality standards for planning, monitoring and evaluation, and hence they are barely effective and incapable of providing the required standard of services to citizens. Equitable systems and rights-based policies and budgets could hardly be achieved without having a solid monitoring and evaluation (M&E) function/mechanism that can oversee the country's development initiatives. Accordingly, Egypt is in dire need for developing the evaluation function and building a link between research & evaluation (R&E) and policy-making issues in order to strengthen what is called "*Evidence-based policies*." Evidence-based policy has been defined as "the integration of experience, judgment and expertise with the best available external evidence from systematic research" (Davies, 1991). Equally important, there is a need to promote the dialogue between policy and decision makers and research and evaluation practitioners in order to gain the fruits of development and to make a difference in the quality of lives of people.

Rationale and description of the formation of EREN

With reference to the historical development background of in the case of Egypt presented above, the following were the key challenges to the process of evaluation in Egypt. These challenges constitute the driving forces of the Research & Evaluation Network in Egypt. They could be summarized as follows:

- Most of the development programs in Egypt are becoming more and more questionable in terms of *effectiveness, relevance, impact and sustainability*.
- Lack of *accessibility to evidence-based knowledge* because of the weak institutional and human resource capacities especially, in the governmental institutions in Egypt.
- Mechanisms of *transparency and accountability* of the R&E information are not activated adequately.

- *Weak coordination and partnerships* amongst the different stakeholders result in limited exchange of experiences and dissemination of R&E findings.
- Number of professional researchers and evaluators are limited, and the capacities of the mid-level ones are not strong enough to provide quality evaluation processes.

The network primarily started informally amongst a group of 13 development practitioners, free-lance consultants, Government officials and people concerned with lack of effectiveness of development initiatives in Egypt. All were, and are still, working in the development field in different international and national organizations, and witnessed the weakness of results, the lack of guidelines and standards, the limited accountability with special emphasis on professional ethics, the limited capacities and the frail accountability particularly in the area of research and evaluation.

In December 2008 a group of national experts, university professors, development practitioners as well as Government partners, in collaboration with UNICEF/ ECO, held a symposium called "Research and Evaluation in Egypt: Towards Evidence-Based Policies" to discuss the challenges facing the evaluation of development interventions in Egypt. That definitely has had an impact on the effectiveness and the impact of the development results as well as on the policy-making process. The symposium ended up with the formation of a constitution of an informal evaluation network that seeks to enhance collaboration amongst researchers and practitioners in development, to promote cross-disciplinary debate and capacity development opportunities on R&E, to enhance the generation and the dissemination of knowledge, and to enhance the quality of R&E in Egypt. The network is currently being registered, under the Egyptian law, as a formal evaluation association that is founded by 13 members and governed by seven members serving as the Board of Directors, to be rotated on bi-annual basis. The total numbers of members, to date, are 151.

Strategy and implementation

Advocacy for evidence-based policies: bridging the gap between policy makers and researchers/ evaluators

Since its start EREN was keen to contribute to creating the enabling environment to professionalize the function of evaluation and to utilize it for improving programming as well as for providing evi-

dence for equitable decision-making. At the 2008 Symposium, a key EREN member prepared a policy paper that explores the situation of evaluation in Egypt and analyzed the challenges of evaluating the development interventions in the Egyptian context. This paper was presented in the presence of participants who were representing national and international decision and policy makers. There it was frequently emphasized the urgent need to advocate for paradigmatic shift in the thought and practice of evaluation in Egypt and the importance to link it to policy-making and to programmatic excellence.

EREN was keen to primarily partner with the Centre for Project Evaluation and Macro Economic Analysis (PEMA) under the Ministry of International Cooperation (MoIC), to have the network formally established. Due to the instability in the period after the Egyptian Revolution, partnership with the Ministry was weakened. However, MoIC is expected to auspice the upcoming national conference that EREN plans to conduct by the end of 2012 on "Country-Led M&E to Enhance Efficiency and Accountability." This ministry is an important national partner, since it is responsible for planning as well as for monitoring and evaluating aid effectiveness in Egypt. In addition, an expected partner in this conference is the Ministry of State Administrative Development that is mandated to monitor and improve the performance of the Public Sector in Egypt. In addition, it includes the "Transparency and Integrity Committee" whose mission is to enhance transparency and integrity efforts.

Finally, in order to contribute to the generation and dissemination of evaluation materials in Egypt, where a good part of the national partners are only Arabic speakers, EREN constituted an "Arabization and Publication" initiative. The latter is responsible for Arabizing/translating evaluation policies, standards and materials from English to Arabic language. This would definitely help to fulfil the demand to market for the use of evaluation.

M&E capacity development to enhance ownership, harmonization & sustainability

Capacity development, in the evaluation field specifically, is seen as part of the broader effort to improve public policy-making to achieve development goals. Consensus on the DAC Network is that partner evaluation capacity plays a key role in enabling ownership of development evaluation and ensuring mutual accountability for development results, and is a decisive factor in improving alignment with partner evaluation systems. To enhance capacities of national part-

ners in the area of evaluation, EREN instigated multiple initiatives with diverse development players including government officials, researchers and evaluators, and media people.

EREN's strategy to enhance capacities of national partners involves targeting diverse audiences: senior evaluators, mid-level professionals, Government partners, media people, young people as well as other civil society partners like NGOs. The purpose of capacity building is perceived as investing in results achieved through capacity building. Senior evaluators were targeted in more than one session in 2010, while inviting well known national and international consultants to speak about "Governance and Evaluation," "Impact Evaluation," "Evaluating Budgets" as well as "Advocacy and Evaluation." Most of EREN's initiatives target mid-level professionals by conducting research and evaluation seminars, institutionalizing diploma on R&E, and conducting open seminars for discussion around different evaluation issues.

Media people were significantly targeted by ERNE, where a "Media Watch Group" was constituted and three workshops were conducted for media people from more than 16 media institution/channels. It started in 2010, in collaboration with PLAN International and the Faculty of Communication in Cairo University, to conduct a seminar on "Enhancing Role of Media People in Utilizing Research and Disseminating Knowledge," where 43 media people and researchers participated and documented their training needs to build channels of communication between media and research. In 2011 and 2012, two media seminars were conducted on "Development Aspects in Media Coverage" and on "Extending Partnership between Media People and Researchers." A new partnership was initiated between the Press Syndicate and EREN that is aimed to flourish in 2012-2013 to strengthen the media watch group that can monitor the media performance and coverage of development issues.

Finally, an emerging initiative has developed to enhance capacities of junior researchers and evaluators in planning, designing and conducting research and evaluation and to encourage students to play a more pro-active role in M&E their communities. (Details on capacity building events are mentioned in the section on 'Progress and Results'.)

Towards developing equity-focused and gender-sensitive evaluation

Although one of the 'raison d'être' of EREN is its passion and belief in issues of equity-based development, community-based M&E as well as empowerment and transformation, its achievements in this area are limited. In 2010 a session was conducted on "Gender and Evaluation" that targeted senior and mid-level researchers and evaluators. Gender is integrated in one of the Diploma Curriculum, "Modern Trends in Development," that presents concepts like gender, Results-Based Management and Human Rights-Based Approach as modern trends in development. Last but not least, a promising collaboration with UN Women is emerging, where the latter expressed interest in adding one separate course on "Gender-based Evaluation" in addition to its support in Arabizing manual on "Gender Sensitization of Evaluation."

Key challenges and bottlenecks that hampered ErEN's capacity to contribute to the above strategy

There is a long way to go in order to substantially achieve a tangible progress in "Country-led M&E," due to the complex challenges the national institutions have in their structures, and the hard and disjointed management of the Government machinery would not make the change easy and fast.

The culture of generating, utilizing and exchanging information is weak. A culture of protectionism amongst people working in, or concerned with, research and evaluation could easily lead to risk of stagnation of the sector of research and evaluation in Egypt. There is also a lack of volunteer work and collective responsibility. Research and evaluation consultants' time is valuable, where they are committed with different tasks and assignments, added to the fact that their time is worth resources.

Belated official registration of EREN, especially with the multiple turnovers of the Minister and key officials in the Ministry mandated to approve the network as an official evaluation association, has been another bottleneck.

Progress and results

Developing capacities of national partners

1. **Two-week seminar on “Designing Evaluation/Research”**

In collaboration with the Health and Environment Education Association and the National Planning Institute, EREN conducted these seminars for 57 government officials, mid-level professionals and junior university professors involved in planning and implementing evaluation. The purpose was to provide participants with basic understanding of the discipline and profession of evaluation and to develop the knowledge and capacities in designing an evaluation research with a sound methodology.

2. **One-year professional diploma on research and evaluation**

EREN, in collaboration with UNICEF/ECO and the Dutch and in collaboration with two Egyptian universities (Assuit and Helwan Universities), adopted an initiative to institutionalize a professional diploma in research and evaluation. This diploma targets development officers specialised in M&E, government officials working in relevant fields, mid-level researchers, and individual emerging evaluators. The diploma is following the credit-hour system amounting to a total of 24 credit hours during a period of one year.

3. **Enhancing the role of evaluation in improving governance practices**

In an attempt to demonstrate the intrinsic link between evaluation and governance and to use evaluation as one of the tools to strengthen governance practices in Egypt, EREN conducted a seminar for 66 researchers, evaluators and senior professionals on “Enhancing the Role of Evaluation in Improving Governance Practices.” Although EREN conducted the above mentioned workshop only one time, it is aiming to continue a series of “Evaluation and Governance” workshops, especially after the Egyptian revolution, where the culture of transparency, integrity and accountability are widely welcomed by Egyptians at the different levels.

4. **Initiating child-youth led research and evaluation**

In collaboration with NCCM, EREN piloted an initiative to enhance capacities of 38 junior researchers and evaluators divided

into two age categories 14-17 and 18-24. The purpose was to disseminate and strengthen the culture of evaluation in schools and universities, while enhancing the capacities to plan, design and conduct R&E. Six pieces of research plans were developed and implemented by students in their schools and universities to come out with final reports that were presented in a public event organized by NCCM.

Knowledge dissemination to proliferate culture and practice of evaluation

1. Role of media in dissemination of research results and in knowledge management

EREN started the process of developing the capacities of media people, journalists, and communication specialists in Egypt. Training workshops are meant to be a medium conducive to building relations between researchers and evaluators and between media people, and to get the latter committed to get engaged in development issues. Two workshops were held with Journalists' Syndicate and with Faculty of Communication in Cairo University.

2. Translation and publishing project to avail and disseminate evaluation resources in Arabic

Evaluation materials hardly exist in the Arabic language, and therefore most, if not all national partners do not have their chance to build their knowledge or to enhance their skills in evaluation. EREN has established an initiative to translate key materials and key national research in the country from English to Arabic to avail resources in national language, to help accentuate the culture of evaluation, and to activate dialogue amongst partners on evaluation issues. To date, three key evaluation books were translated, added to UNEG quality standards for ToRs and reports, and short articles/ papers on Utilization-Focused Evaluation, national capacity building, etc.

3. Professional development seminars

Professional development seminars are conducted to exchange information on recent issues in R&E and are mainly targeting mid and senior level professionals. Three seminars were conducted on "Outcome Mapping," "Country-led M&E" and on "Community-based Monitoring."

4. **Website for EREN (Under Construction)**

EREN is developing a website that is expected to be launched soon.

Bridging theory and practice: towards evidence-based policies

National Conference on “Country-Led M&E to Enhance Transparency and Efficiency”

EREN is partnering with UNICEF, IDRC and other international and national partners to conduct a national conference on “Country-Led M&E to Enhance Transparency and Efficiency.” The conference is meant to be the first of its kind to engage policy makers, key officials, and the public towards the significant need to establish M&E systems in the Government, to improve information management systems and to encourage R&E to support evidence-based decision making.

Key enabling factors for EREN to achieve expected results

Despite the complex instability Egypt is passing through, the revolution has led to a general atmosphere of openness and quest for transparency, integrity and accountability. There is bigger demand for collective responsibility and public action.

Due to the decline in aid effectiveness and the reduction of international aid at the same time, disparities are prevailing, creating an imbalance in the supply-demand flow, and hence organizations have started to explore and reread the situation aiming to adjust strategies to improve results.

UNICEF’s belief in the significance of the evaluation function, and its support to establish and strengthen national evaluation, boosted lots of initiatives and constantly provided required technical and financial assistance to make the network happen.

Innovations and lessons learned

Innovation. For the first time in the Arab World, a professional diploma on Research and Evaluation is drafted in Arabic language (9 curricula for professors and for teachers) to cover the basic level of evaluation and development. These include project management,

research methodology and research ethics, evaluation of development programmes, public policy analysis, statistical analysis and statistical computer packages, modern trends in development, knowledge management, and intellectual capital development, social planning, skills development added to applied research (project).

Lessons Learned:

- It is good to start from bottom-up and to gain constituency; however having the support of the political and administrative leadership is vital and significant to establish the network faster.
- Adopt the policy/ advocacy strategy as one of the main strategies an evaluation network should be concerned about.
- Expand the membership to include different key players and influential members from the beginning, as this would boost the energy, enhance confidence in the network and help to work on policy level.
- Seek to implement joint programmes and initiatives, as this would help in investing on efforts and on resources.
- Choose the agents of change and make them your façade of promoting the network and defending it whenever needed.
- Build good linkages between knowledge and management, and between research and evaluation.
- Last but not least, work intensively to attract the private sector and the media as both can easily support the whole initiative whether in generating resources and collective responsibility or in utilizing evidence and evaluation results in evaluation and especially in media channels.

Next steps

- Conference on “Country-Led M&E” in Egypt – December 2012
- Formative evaluation of Diploma on Research and Evaluation – August 2012.
- Completion of Arabization of one book on evaluation: “Most Significant Change” and of “From Policies to Results.” – September 2012.

- 10 day series of seminars on good field work for a quality research and evaluation – August through October 2012.
- Mini-IPDET to be conducted with IDRC and regional partners in Egypt – January 2013. This includes the Translation of the *“Road To Results”* book as part of the Arabization process of EREN.
- Launching EREN website after being fed with research and M&E information – November 2012.
- Two professional development seminars on *“Gender-based Evaluation”* and on *“Impact Evaluation”* – December 2012.

FRANCE: FONDS POUR LA PROMOTION DES ETUDES PRÉALABLES, DES ETUDES TRANSVERSALES ET DES EVALUATIONS (F3E) ("FUND FOR THE PROMOTION OF PRELIMINARY STUDIES, CROSS-CUTTING STUDIES AND EVALUATIONS")

F3E: A NATIONAL NETWORK DEDICATED TO THE CULTURE OF EVALUATION, IMPACT AND QUALITY OF THE ACTIONS OF A COMMUNITY OF DEVELOPMENT ACTORS

Laurent Denis

Director

Background

F3E is a French not-for-profit network dedicated to the evaluation, impact and quality of the development activities implemented by its members. It is currently made up of approximately 100 members, namely NGOs, local governments and hospital centres, all conducting international solidarity, decentralised cooperation or inter-hospital activities.

It was created in 1994 following a concerted initiative between the State (Ministry of Foreign and European Affairs) and NGOs (local governments joined in the 2000s and the hospitals joined more recently), around the shared goal of spreading the culture of evaluation as a step in the on-going improvement of action (whence the founding credo of F3E, "evaluating in order to evolve").

The overall objective of F3E since its creation has been to help NGOs – and, more broadly, non-state actors (NSAs) or civil society organizations (CSOs) – become more professional, by giving them recourse to study procedures and external expertise, in response to their particular needs as development actors.

The creation of F3E was the result of merging two study funds, the first created in 1989 to support NGOs' preliminary study procedures, the second created in 1991 to enlarge this support to include external evaluation practices and transversal studies.

The three founding principles of F3E, which were established in 1994, are as follows:

The principle of evaluation

Evaluation is at the heart of F3E's identity and its project. For F3E:

- what can be learned from evaluation is more important than accountability;
- each evaluation has its specificities and must be "tailor-made" in its conception and implementation, by and for the actors who participate in it and use its results;
- the two factors that make up the utility of an evaluation are, on the one hand, its appropriation by the actors who sponsored it and, on the other hand, the external opinion that it brings.

This is why external evaluation is important, as long as the actors it targets are the ones who sponsored it. But the evaluation also requires a culture that is favourable to critical analysis and sufficient internal methodological capacities; it is not a miracle cure, and it is not enough in and of itself.

Thus the strategy of F3E since 2005 has been to promote a host of studies and methodological procedures to complement external evaluation, preliminary studies and cross-cutting studies: guided self-evaluations, strengthening the systems of monitoring and evaluation, capitalisation of experiences, impact studies and "post-evaluation" supports to facilitate the implementation of the recommendations of the external evaluation.

More recently, F3E has been working on the question of adapting a global-quality approach to the NGO sector. This organisational quality approach creates interesting possibilities in that it should make it possible to better put the external evaluation exercise into perspective in the context of a learning organisation.

The principle of dialogue and working together

In line with its conception of evaluation, F3E emphasises the involvement of the different stakeholders concerned by an evaluation, with a view to dialogue and cooperation regarding practices and the actors being evaluated.

F3E thus sees itself as a coming together of actors with different natures. It considers that the stakes and challenges of the multiple actors are at the heart of development impact and effectiveness issues.

In this spirit, F3E has progressively extended and diversified the nature of its base, made up at the beginning by some of the most professional NGOs.

This opening has been accomplished by bringing members together through creating exchange activities and working groups whose goal is to produce knowledge and disseminate methodological references conceived for and by the non-state actors based on their practices, expectations and needs.

It has also strengthened the strategic dialogue with French public authorities and with other groups of NSAs. The spirit of this dialogue is based on the idea that the NSAs act of their own initiative and are financially supported by public authorities, not as operators, but as development partners. In this way, F3E, a mechanism to professionalise NSAs supported by public authorities, participates in a public policy of strengthening the effectiveness of these actors.

The principal of collective benefits and the general interest

F3E is a system of pooling means (human, financial, methodological, expertise, experience, etc.); a resource centre dedicated to evaluation, impact and quality of development actions.

In that sense, it responds to a mission of general interest, going beyond its members and just French development actors. The mentoring it provides its members is promoted and capitalised with a view towards disseminating and sharing with the other actors so they can adapt it to their needs.

Through these principles and their translation in the implementation of its activities, F3E participates in institutionalising evaluation in the field of non-governmental action by bringing together:

- Outside opinion
- Peer opinion
- Dialogue and cooperation between non-state actors and the State
- The process of internal learning and external accountability
- Strengthening individual capacities and network learning

Strategy and implementation

In France, F3E has, without a doubt, the most formal and developed experience with a system dedicated to the development of national evaluation capacities in a country where there is not a strong culture of evaluation and where repeated efforts to institutionalise evaluation have not succeeded.

Since its creation, and by its very purpose, F3E has been contributing to strengthening an enabling environment for evaluation in France: F3E is a system that favours the institutionalisation of evaluation in the sectors of international solidarity, decentralised cooperation and inter-hospital cooperation.

While it prioritises requests for evaluation from non-state actors, F3E also recognises the importance of developing its offer, by emphasising the quality and diversity of its expertise in evaluation; its role as a demanding third party contributes to professionalising the evaluators, and its methodological productions are useful to both the evaluators and those who sponsor the evaluations.

Dialogue and cooperation with French public authorities favour the construction of a common culture of evaluation in the area of public aid for development.

Being involved with the *Société Française de l'Évaluation* (French Evaluation Society) – in particular, F3E co-directs a working group within the SFE, “Evaluation and Effectiveness of Development” – is, for F3E, another way of contributing to the culture of evaluation in France.

The upcoming creation of an F3E Charter will provide a tool for advocacy in favour of evaluation.

F3E also contributes to strengthening evaluation capacities and the emergence of an enabling environment in the Global South: Involvement of Southern stakeholders in the evaluations; management and coordination of a French-language evaluation portal (until 2009); support for the organisation of the first Senegalese evaluation days (in 2008); participation in the *Réseau Francophone de l'Évaluation* (RFE – Francophone Evaluation Network).

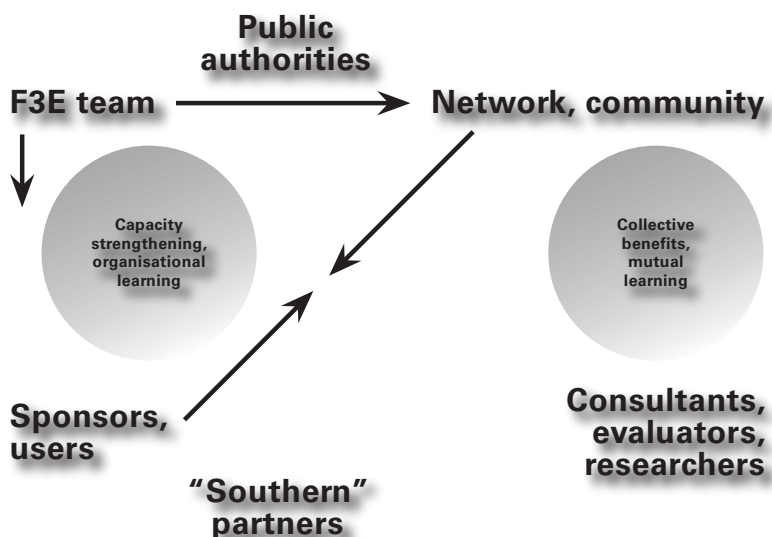
Creating an F3E network in Europe and internationally is part of this objective of strengthening evaluation capacities in development cooperation actors.

F3E participates regularly in evaluation steering committees working on French public aid for development, in order to speak for French non-state actors.

Enhancing individual capacities to conduct credible and useful evaluations

The F3E system is organised around the following stakeholders:

- Within the system, its members (a network of about 100 NGOs, territorial collectives and hospitals) and their partners in the countries concerned
- A Board of Directors of 16 people elected by the members' General Assembly
- A team of ten salaried workers in charge of coordinating the system and implementing activities, working closely with the Board of Directors
- Public partners (MAEE, French Development Agency) involved in the strategic dialogue and the operational monitoring of F3E
- Consultants, evaluators, trainers and researchers involved and mobilised in F3E activities



The key role of F3E is that of “Demanding Third-Party Mediator and Mentor”:

- Demanding Third Party = guarantee of quality, usefulness, credibility and objectivity in the process of external evaluation
- Mediator = organisation of dialogue and cooperation among the stakeholders of an evaluation
- Mentor = strengthening the capacities of the sponsors/users, even those of consultants/evaluators



Concretely, F3E guides the phases of evaluation conception (creation of the Terms of Reference), the choice of external evaluators (invitations to tender and selection), interfacing with the external evaluators (framework, approval of intermediate and final reports) and possibly the evaluation steering committees that it may be called upon to run. F3E can also assist in the application of evaluation results and in decision-making based on the evaluators' recommendations.

The work of F3E: Strengthening organisational capacities and collective learning.

Strengthening organisational capacities and learning is achieved through activities involving mentoring, study co-funding, advising support, training in methodology and making tools and methods available.

The collective benefits and mutual learning among F3E members (and beyond) come about through activities involving approval and dissemination of studies, sharing practices, debating, capitalisation of experiences and producing knowledge.

Evaluation, as promoted by F3E and, more widely, all of the activities implemented by F3E, are part of a cycle of knowledge management (learning loop) that follows three major stages:

- Analyse and draw learning points from an action
- Adopt these learning points and share them
- Reinvest them in action

From a more organisational standpoint, this knowledge-management cycle reinforces the connections among the levels of governance, strategy, process and results (retroaction), thereby favouring continued improvement (learning and innovation):



This approach also allows for making connections and managing the variations among the projects, programmes, strategies and policies.

F3E is working today around two operational axes broken down by type of activity; its activities taken as a whole make F3E a sort of resource centre:

- Strengthening individual learning capacities: Support through advice, guided studies, co-funding and training
- Coordinating the network with an eye towards mutual learning: Presentation of studies, exchanges, working groups, production of tools, observation and dissemination

Strengthening equity-focused and gender-sensitive evaluation systems and evaluations

The majority of F3E's members act with a view towards social change and combatting poverty and inequality. They work in different sectors, including education, health, access to clean drinking water, rural development, micro-finance, fair trade, etc.

A cross-cutting issue is capacity building and the empowerment of partners in the Global South. Work is currently being done on analysing the strategies of French NSAs for strengthening capacities and local governance. The goal is to produce methodological references to define, implement, monitor and evaluate a strategy for strengthening partners, whether they are civil society organisations or local governments.

Finally, gender is a subject that F3E has wished to get involved with, considering that it is a criterion of quality for development actions. Through a specific programme of training and methodological productions, F3E promotes integrating gender into the project cycle.

Institutional capacity to be able to deliver on the three issues identified above

By opening its base to a number of non-state actors, especially local governments (decentralised cooperation) and hospitals (international hospital cooperation), F3E has been able to strengthen its representativeness and thus its institutional legitimacy.

Partnerships with other national and regional groups of NSAs has also enabled F3E to gain a foothold in the institutional landscape and to promote its own actions: national NGO platform (Coordination SUD), national platform of actors in decentralised cooperation (*Cités Unies France*), *Programme Solidarité Eau (pS-Eau)*, platform for development education and international solidarity (*Educasol*), *Association des Responsables des Relations Internationales et de la Coopération Décentralisée des collectivités territoriales* (ARRICOD), networks made up of various French regions, etc.

The creation of a strategy and a programme of multi-year plans have enabled F3E to consolidate its organisational means and its service delivery aimed at its members and beyond. The development of strategic dialogue and operational collaboration with public authorities were facilitated by this.

Becoming part of a network in France (SFE) and internationally (AfrEA, RFE) has also strengthened F3E institutionally by giving it higher visibility and by providing access to the experience of other actors with the same objectives or work methods.

Bottlenecks and challenges

The main obstacle encountered has been the weak culture of evaluation of public policies in France and the dominance of a culture of control and accountability. This context is imposed on NSAs, to the detriment of a culture of evaluation that is above all centred on learning and improving practices. It is indeed difficult to reconcile the need to be accountable and the need to draw critical lessons from evaluation in order to do some institutional soul-searching and develop practices with a view towards being more effective.

The specialisation of consultants/evaluators presented another major hindrance. NSAs have very specific activities and it is difficult to identify an expert assessment that is at the same time sufficiently external and has a minimum grasp of the particularities of this sector in order to be able to carry out a useful evaluation in terms of learning rather than just reporting. There is also the problem of the cost of external expertise and thus access to consultants and study bureaus who could develop expert assessment specific to this field but whose fees are much too high for the actors concerned.

Finally, the low level of involvement from French public authorities in strengthening evaluation capacities in developing countries, despite a specific programme of the Ministry of Foreign Affairs (the “*Partenariat en évaluation – PARTEVA*” programme) whose partial implementation was far from reaching objectives, did not enable F3E to invest more heavily in this area although there was a strong desire to contribute (especially with regard to the results of the external evaluations that recommended promoting F3E’s international experience, particularly in African countries).

Progress and results

Significant development can be noted in the practice of evaluation among French NSAs; F3E has certainly contributed to this, since its members in particular are now more inclined to call upon external evaluation through their own means while referring to the knowledge and works of F3E.

Starting from and going beyond this certain dissemination of the culture of evaluation among French non-state actors, attention has shifted strongly these last few years to approaches that complement external evaluation, namely, the strengthening of internal systems of monitoring and evaluation, the development of the practices of capitalisation of experiences and knowledge management, and studies on effects and impacts. Likewise, the process that is underway to create a global quality management system adapted to the NGO sector opens up interesting perspectives for the development and institutionalisation of evaluation among these actors.

The most unexpected or indirect result may be the contribution by F3E to strengthening evaluation capacities of consultants from the Global South, who know and use F3E’s methodological works, whereas F3E’s priority target is made up of requests for evaluation by non-state actors.

Key enabling factors

The main strength of F3E is that it is anchored to concrete mentoring of analysis and improving actions on the one hand, and its collective and multi-actor aspect on the other hand, which enables F3E to structure the strengthening of individual capacities and collective learning. It is thus a very operational system, specialised and focused on a type of actor, able to structure individual and collective approaches, practical experiences and knowledge production, mentoring and training, etc.

Another factor in F3E's success lies in the expansion of its base with a simultaneous strengthening of F3E's networking aspect. Although this expansion has brought about diversification in its ranks, F3E is made up of actors who operate in the same field, that of development (beyond the specificities of the actions of NGOs on the one hand, local governments conducting decentralised-cooperation activities on the other, and finally hospitals engaged in inter-hospital cooperation); this uniqueness of action is an important element in collective identity and thus the building of similar interests and a common culture around evaluation practices.

The last key factor (and not the least) is an effective and constructive partnership with public authorities since F3E's creation, even though the institutional context is shifting and has evolved significantly since the 1990s. Indeed, F3E is supported by the French Government without being strongly pressured in its strategic and institutional choices; this is the result of a culture of dialogue and cooperation that allows for a better reconciliation of the issues of accountability and learning.

Innovations and lessons learned

The main lesson learned is that the promotion of evaluation must be done as concretely as possible, based on what it produces and its real usefulness: this is what is at issue in promoting the process and results of evaluations. This promotion must be done first on an individual scale, that is, at the level of the organisation sponsoring the evaluation, but also in a more collective and cross-cutting way, that is, by sharing among actors the points learned from evaluations having to do with shared subjects.

This central issue of promoting evaluation assumes that the actors agree to share and open the results of their evaluations to debate.

The principle of collective benefits that forms the foundations of F3E has, since its creation, allowed it to give free access to evaluation reports to all of its members. Since the mid-2000s, F3E members have agreed to share their evaluation reports on-line at the F3E site (www.f3e.asso.fr) being made available to non-members.

An innovative aspect of F3E lies in the fact that it incorporates some complementary functions of a resource centre such as mentoring, co-funding, promotion, training, the production and dissemination of knowledge, and advocacy. This complementarity enables F3E to develop its activities in a virtuous process of managing a knowledge cycle: analysis, appropriation, application.

Another innovative aspect is that F3E reconciles individual and collective learning by linking its members in a network, which creates confidence, inter-knowledge and reciprocal interests. This networking particularly facilitates the anchoring of F3E's actions around the concrete activities and needs of its actors; this very operational dimension of F3E's activity is a powerful leverage for disseminating the culture of evaluation to the extent that it promotes the demand for evaluation and uses the expertise of the NSAs themselves to formulate that demand and identify the type of external expertise to call upon in response.

Next steps

With the aim of more effectively strengthening the individual capacities of its members when it comes to evaluation, F3E will pursue the work already started on quality approaches in order to situate evaluation more forcefully in a perspective of organisational strengthening. The direction chosen is to design a process of global quality management that offers a framework of organisational learning and continued improvement in which the culture of evaluation as promoted by F3E can find its meaning.

In its efforts to strengthen itself institutionally, F3E is currently drawing up its own charter, which will enable F3E to reinforce its institutional visibility, collective identity and advocacy in favour of a culture of evaluation quality and impact. F3E particularly intends to strengthen its advocacy for an evaluation approach that takes into account the complexity of the reality to which it is applied as well as the issues specific to the interaction of multiple development actors.

Networking by F3E on a European and international scale in the spaces (existing or to be strengthened) designated for the development of evaluation will be pursued and intensified, both to enrich F3E's own practices and to collectively promote a culture of evaluation that encourages development.

INDONESIA: INDONESIAN DEVELOPMENT EVALUATION COMMUNITY (INDEC)

BUILDING THE EVALUATION FIELD THROUGH STRENGTHENING A NATIONAL EVALUATION ASSOCIATION

Benedictus Dwiagus Stepantoro

Chairman/President

Umi Hanik

Chair of External Communication, Networking and Advocacy

Background

Contextual Background

Since the Reform (*Reformasi*) or Post-Soeharto Era started in 1998, Indonesia has been struggling to improve the governance for delivering development outcomes. With greater decentralisation and higher degree of democratisation at sub-national and local levels, the public now has more voice to demand better government performance in delivering development results. It is also accompanied with the re-emerging New Public Management thinking that drives most public organisations to find better ways to manage their performance.

Every government agency in Indonesia has moved towards an evaluative culture. But it is still a long journey to go. At this stage, the main focus is still on the *monitoring for performance* and not yet on *evaluation*. It is supported in the form of legal frameworks through different kinds of laws and government regulations. At the national level most national government agencies have established monitoring and evaluation as they are trying to meet the expectation of having a more structured way/mechanism in operationalizing their institutional imperative or directive pressures towards managing for performance.

On the other hand, Indonesia has also been receiving development aid. With the global pressure to increase aid effectiveness, all the

development stakeholders have put their hopes on the implementation of the Paris Declaration to increase the effectiveness of aid. It was then followed by a growing demand for M&E specialists, particularly from 2006 up to now, especially from agencies in the development aid sector which are expecting transparency and accountability for the programs they execute in Indonesia.

All those mentioned above have been affecting the way the people look at the development process. Issues around quality, coverage and reach of development results have emerged. The M&E function was then perceived by all to become the prerequisite for better achievement and distribution of development results.

Members of the Indonesian public are now more active and critical in monitoring the way government implements their mandate to deliver public service. Each program now is considered to be important for scrutiny through an M&E process and to get publicly published in a more transparent way. Thus it triggered significant demand for M&E specialists to support government (national and local) in measuring performance, evaluating their development programs and disseminating their the success (and failures).

Now we have significant numbers of development professionals entering this M&E field, though unfortunately not all with sufficient competence and skill. For more quality work and output, these new-entry M&E professionals need a platform for knowledge exchange and capacity building.

Therefore there is a growing need to establish a kind of community of practice of M&E in Indonesia.

Historical Background of InDEC establishment

InDEC was established over quite a long process. It was initiated by three key persons:

- Mr Benedictus Dwiagus Stepanoro who was an M&E practitioner who established a group e-mail listserv of Indo-MONEV. He formed Indo-MONEV to become a platform for communication among M&E practitioners in Indonesia. It was noted that at that time, despite the growing number of development professionals jumping into the M&E field, there was no such forum for communication to share information, knowledge and experience among themselves and learn from other M&E practitioners.
- Mr Dadang Solihin who was Director for Regional Development Performance Evaluation of BAPPENAS (National Development

Planning Board) and is very passionate in establishing an M&E professional community; and

- Ms Umi Hanik who was an M&E Specialist/Consultant working with BAPPENAS and shares the same interest to form an M&E Community/Network in Indonesia.

Key events in the process of the establishment of InDEC are described below.

The listserv (Indo-MONEV) was established by Mr. Benedictus Dwiagus Stepantoro in 2007. However it was in September 2008 that the listserv was launched to get memberships. It was well received. At that time the membership grew up significantly in only a few months. The unexpected overwhelming responses helped understand that there were many people (professionals) who have high interest for Evaluation.

Later, in early 2009, the initiative to establish InDEC came from Mr. Dadang Solihin, a director in BAPPENAS (National Development Planning Board of Indonesia) and Ms Umi Hanik, who, in mid-2008, had been preparing a strategic plan for the newly M&E unit in BAPPENAS. They agreed to put the initiatives into the strategic plan. Preparation and initial assessment was then conducted under the support of GRSP II CIDA. Mr. Dadang, Mr. Dwiagus, and Ms Umi were then putting the ideas and initiatives into actions. They agreed to establish and launch InDEC. Broader facilitation and coordination meetings involving M&E practitioners were conducted as well to assure whether InDEC would gain positive feedback and is needed.

On 4 June 2009 InDEC successfully made a public declaration of its establishment. It was an important and notable remark that some M&E practitioners in Indonesia have committed to build and strengthen the M&E field in Indonesia. After two and half years the establishment of InDEC was strengthened by having its Constitution/Bylaws adopted during the 1st National General Assembly/Congress of InDEC on 28 January 2012. During that General Assembly/Congress, Mr. Dwiagus was elected as the First Chair/President of InDEC.

Organisational Setting

After the first National General Assembly/Congress, InDEC managed to set up an organisation structure to govern the organisation. Forty one active members were selected to sit on the governing

committee. In addition to the usual officers, its structure includes chairs of Internal Organizational Development; External Communication, Networking and Advocacy; Capacity Building; and Research and Development.

Contribution

Although InDEC was established in 2009 with its declaration, it was only in 2012 that it started becoming stronger with its organisational arrangements (constitution, bylaws, organising structure board members and work plan).

It is still very early to make any judgment on the achievement and contribution towards building the national capacity for monitoring and evaluation. However, we would like to say that InDEC, even with its limitations (due to its voluntarily-based nature, resource limitation, and other constraints) has contributed in several ways:

Individual capacities strengthening

From 2009 up to now InDEC has been putting its effort to enhance individual capacities by conducting a limited number of capacity building activities (mini-training, mini-seminar or sharing sessions). For example:

- sharing of experience on IPDET Training;
- sharing of learning around M&E methods (random method for social program); and
- other thematic issues (such as post disaster assessment).

In addition, we have also been utilizing the email listserv forum and face-to-face meetings to discuss particular issues addressing M&E problems faced by members. Some examples, among others:

- How to check the quality of your M&E system design;
- How to assess an evaluation plan;
- How to assess relevance;
- How to address ethical issues in evaluation; and
- Internal evaluation vs. external evaluation.

A journal club was also initiated to stimulate the interest of some members who are really keen in enhancing their theoretical knowledge and awareness about current thinking on evaluation practice.

A journal club session was conducted once, but it drew little interest from members.

Enabling environment enhancement

InDEC has not been significantly strengthening the enabling environment for better evaluation practice. Nevertheless, some activities that might influence the enabling environment can be noted as follows:

InDEC has been using its email listserv as a media for promoting value and awareness to its (passive and active) listserv members on good evaluation practice, including national evaluation policies and system. We noted that some of the listserv members come from government institutions or work for government as their client. We hope that those members could be our key influencing agents in advocating for national evaluation policies and systems.

We seek to influence different ranges of stakeholders, through their active membership and participation in the organization, and also any kind of engagement activities (embedded in our capacity building activities mentioned above). The key stakeholders that we are trying to engage & influence are:

- (i) *Government officials* (national and local): so they can have capacity to demand for and manage evaluation, as well as use evaluation results/findings;
- (ii) *Members of Parliament*: so they know how to demand and use evaluation results/findings to enhance their supervision mandate;
- (iii) *Academia*: so they can develop and enhance the theoretical thinking on evaluation;
- (iv) *M&E Professionals working in NGOs, CSOs, or project/programs funded by donor agencies*: so they can improve their practice in M&E;
- (v) *Independent Evaluators*: so they can improve their evaluation practice;
- (vi) *Media People*: so they can play a bigger role in mainstreaming evaluation.

We believe that some of our members have experience in providing support to government in moving toward greater transparency in development program/project management in their organiza-

tions. Most of them are involved in managing programs/projects were they could do some advocacy to their organizations so their programs (with the input, activity, output and outcome) have to be monitored and reported periodically using improved M&E tools that are provided and advised by them in their capacity as M&E specialist/officer in their field.

However we lack data to show the evidence about those situations, since we have not conducted any research exploring the M&E activities conducted by our members. We believe such information would enable InDEC to make an enhanced contribution to improved national monitoring and evaluation policy and systems.

One of the key events that InDEC has organised in promoting national evaluation was a seminar organised on promoting the M&E system for the Master Plan for Acceleration and Expansion of Indonesia Economic Development (MP3EI).¹ InDEC has engaged government institutions (National Development Planning Agency and Coordinating Minister for Economic Development) as partners. During the event, InDEC tried to convince a significant number of people, including high officials in the government institutions, to put serious thought in establishing a proper M&E policies and system for MP3EI and allocate proper resources for operationalizing the M&E system. It was considered to be an achievement because after that session the M&E Working Group for MP3EI has been supported by Government and UNDP.

Equity-focused and gender-sensitive evaluation mainstreaming

There has been no specific activity that addressed equity and gender sensitive issues in our activities. Well, not yet. We understand that this interesting emerging theme in evaluation field is important, otherwise, evaluation will endanger itself if it is being ignorant to the equity and gender issues.

1 MP3EI is initiated by the President of Indonesia to set up a basis for accelerating and expanding the economic development in Indonesia, so it can maintain the targeted 7-9 % economic growth per year. The masterplan's focuses are on infrastructure development but with some initiatives to strengthen the enabling environment (policy framework, human resources and technology). Although it is an important planning document, it lacks monitoring and evaluation elements. The MP3EI document can be accessed at the following web address: [http://www.depkeu.go.id/ind/others/bakohumas/bakohumaskemenko/PDFCompleteToPrint\(24Mei\).pdf](http://www.depkeu.go.id/ind/others/bakohumas/bakohumaskemenko/PDFCompleteToPrint(24Mei).pdf)

Challenges and enabling factors

Challenges and enabling factors towards strengthening the national capacity in evaluation and evaluation system through InDEC could be seen from two different views described below.

External side

Evaluation has a long history in the background of development in Indonesia. Evaluation has been viewed as an unimportant additional work in the development process. There has been no evaluative or 'research for policy' culture in Indonesia, due to several reasons:

During the Soeharto Era evaluative culture was very much hindered by lack of culture of research and critical thinking, because of the following:

- There was a high repression toward any form of critical thinking. Anything that seemed to be trying to criticize the government performance via research or evaluation would be inappropriate and imposed as a subversive action towards the ruling government.
- There was almost nothing considered as a proper investment or resource allocation for evaluation or research.
- With a highly centralised system, the government cares less on evaluating performance. Instead, they prefer strong instruction or imperative direction. There was no room or mechanism for giving feedback.
- There was absolutely no demand for good quality evaluative information.

The environment has improved just a little bit in the Post-Soeharto Era. This can be shown from the following phenomena:

- Performance-based Planning and Budgeting has been mainstreamed in the national development planning and budgeting system. Several laws and regulations have been passed to set a framework for monitoring and evaluating the performance of the development program. There are now no less than 28 laws and government regulations pertaining to monitoring and evaluation (20 among them specifically discuss performance evaluation). However, if we review them carefully, those legal frameworks seem to *focus on reporting, less on monitoring, and almost nothing on evaluation*. We would not consider those legal frameworks as a national M&E policy or system.

- Some government organisations have been institutionalising their M&E systems, by setting up M&E Units within their organisations, e.g.:
 - BAPPENAS established a special Deputy Office (at Directorate-General Level) which manages the regional development performance and evaluation in Indonesia;
 - The President's Office also established a special unit 'Presidential Working Unit for Supervision and Management of Development' (UKP4) which monitors the performance of development programs and develops measures/recommendations to accelerate and improve the priority programs. It has the responsibilities not only for monitoring and evaluating the performance of the priority programs delivered by sectoral/technical ministries but also to find a way in debottlenecking the hindrances that cause the delay of the implementation and progress.
 - However, they are still struggling in their process of strengthening their own institutional capacity in establishing their M&E system and managing evaluations in their organisation, due to lack of resources and lack of technical assistance to help them in designing a more systematic approach for capacity building.

Now it has become a trending practice for the elected government leaders (at national or local level) to have a '100 Days Program' with indicators of performance as a performance management and evaluative tool for government, followed by a mechanism to monitor and evaluate the progress/achievement of that 100 Days Program. It is a kind of a priority program from the government which aims at delivering quick wins within 100 days of governing. It is often provided with some indicators (although not necessary solid ones) of performance that people can look up to in assessing the government performance.

There have been emerging evaluations conducted by government. Those are mostly not led by government, but supported by donor agencies. It seems that there is a growing appetite from government for demanding evaluation and/or monitoring information. We noted that not all evaluations were strategically conducted. In most cases, those evaluations were not planned in advance, conducted after issues have been escalated or after an incident or accident happened. For example, an evaluation was conducted after there

was a corruption case on the management of Haj (Islamic pilgrimage) travel and accommodation at the Ministry of Religious Affairs. In another example, an evaluation was conducted after a cross-province bridge collapsed.

Following the implementation of the Paris Declaration and Jakarta Commitment², there is a growing demand in the aid development sector for good quality M&E professionals working in development aid programs/projects. We have noted that the capacity and availability of good quality local M&E professionals is still limited, thus most of the M&E and evaluation works are dominated by external/overseas professionals. There are some credible issues in the local M&E professionals who have been perceived as not sufficiently skilled for doing M&E practice for aid projects funded by donor agencies. It is often the case that hiring external/overseas M&E professionals or evaluators is not accompanied with a 'capacity building' component. There is no transfer of knowledge from those external/overseas M&E professionals or evaluators, who have more knowledge after working in-country, to the local M&E practitioners or evaluators.

There is no centre of excellence for enhancing theoretical evaluation discourse and practice. Evaluation has not been considered as another discipline that might need to be seriously developed and integrated in current curricula at universities. Only very few universities have specialised study programs on evaluation (mostly on education program evaluation or social development program evaluation). It would be good to have more academicians that establish an enabling environment for theoretical discourse on evaluation in the country to get more understanding about the profession and enhance the theoretical knowledge and skills of potential M&E practitioners and evaluators.

InDEC internal side

InDEC has strengthened its organization only during 2012, since it established its organization platform and operational work plan. It was a very good start, but that is not without challenges.

The InDEC Organising Board consists of young M&E professionals who share their common interest and dedication to enhance their

2 The Jakarta Commitment: Aid for Development Effectiveness is a road map for the Government of Indonesia and its development partners to implement the Paris Declaration on Aid Effectiveness and the Accra Agenda for Action in Indonesia by 2014. It was signed on the 12th January 2009 and until now there are 26 development partners adopting the Jakarta Commitment (Riyadi, 2009)

professionalism in monitoring and evaluation. Although this could be an advantage because we have a high enthusiasm for the profession, it also brings us the challenge of reaching out to other people if these young professionals are still perceived to not yet be sufficiently credible. The organisation needs to build the credibility of the people inside the organisation.

InDEC is operating on a voluntary basis. All the Organising Board members are professional who have their own full-time or part-time jobs somewhere else in other institutions. It requires a high degree of commitment and quality time management to run the organisational tasks. If some tasks are so dependent on the availability of the responsible board member, this has an implication on the speed of execution of the plan and also the quality of coordination. Communication style, strategic direction and leadership are crucial in this case. InDEC needs to enhance those areas.

InDEC has just started exploring partnerships through its networks. We need to do more in this area, reaching out to academia, government or donor agencies to support InDEC. We have sufficiently progressed on this, but it could be improved further.

Next steps

Our strategy is and has always been as follows:

- Using various means for interactions to promote knowledge, discipline and professional standards related to M&E, and improve the individual/institutional capacity for quality M&E;
- Creating new and innovative ideas in the field of M&E as a contribution to development practice in Indonesia;
- Facilitation in mainstreaming evaluation in development practice in Indonesia and pursuing the development of a standard and code of conduct for M&E practitioners in Indonesia.

We have a work plan that elaborates that strategy above in more detail, in specifically:

- working towards establishing standards for M&E practice;
- formulating standards for M&E professional competence;
- creation of innovative thinking and ideas and solution to address M&E issues in development;
- facilitating quality education and advocacy on M&E;

- providing recommendations for improving the policy and implementation framework of the national M&E system in Indonesia;
- promoting the formulation of an ethical code of conduct for the professional practice of M&E, to be applied by M&E practitioners in Indonesia;
- communication, networking and collaboration among M&E practitioners, with other related institution and professional organisations, in Indonesia and abroad (regional and international);
- providing capacity building, assistance and supervision to InDEC Members and their M&E practices.

InDEC has developed a program logic to provide more comprehensive overview of InDEC's next steps in the future.

Conclusion

We are aware that all the above-mentioned activities that have been conducted and some other progress that InDEC has made have not yet reached critical mass to bring any changes in the national evaluation capacity, the enabling environment and the mainstreaming of equity-focused and gender-responsive evaluation practice. It would be a very long journey for us towards strengthened national evaluation policy and practice in Indonesia.

We have always been challenged to do evaluation policy advocacy and capacity development in a more structured and sustained way and try reaching out to different stakeholders across Indonesia.

InDEC must explore any measures to strengthen the organisation and build the organisational capacity as well as individual technical capacity related to monitoring and evaluation within the organisation, to enhance its credibility.

Learning from the process since the declaration of InDEC in 2009 to its establishment in 2012, there are some lessons that could be learned from the process.

- InDEC has challenges with human resources to run the organization. There are a limited number of persons who are remaining active. A critical mass of membership is key to be able to move forward.

- We believe that motivation, excitement, passions and patience are keys to keep InDEC on the track and achieve step-by-step progress.
- We need to balance how to manage expectations from different people with the existing conditions that are barriers and bottlenecks.
- Always be opportunistic! Working in partnership with different stakeholders (government institutions, NGOs/CSOs, academia, donor agencies, etc.) would open many doors for further cooperation and supports (in financial or other terms).

KENYA: EVALUATION SOCIETY OF KENYA (ESK)

A CASE STUDY OF THE EVOLUTION OF THE EVALUATION SOCIETY OF KENYA

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Background

The driving force for ESK is the need to provide professional M&E input into Kenya's development agenda through multi-stakeholder collaborations. Accordingly, in recognition of the important role that evaluation professional bodies may play in development, the absence of a vibrant professional evaluation organisation in the country was a strategic opportunity which ESK seized to fill the existing gap. It is also reinforced by a changing landscape in the country with a new constitutional dispensation where the combination of an informed, active citizenry and vibrant media are keeping the government awake in meeting very high expectations, including the observance and practice of transparency, accountability and effectiveness in service delivery. Further, globally there is a growing recognition that national capacity development for monitoring and evaluation systems (including those of professional organisations) is an essential part of the broader support for policy reform and to promote national ownership of evidence-based decision-making aimed at enhancing development in all spheres of life. Towards this end, support for nurturing the professional growth and contribution

of its members to the evaluation profession as a whole is central to ESK's objectives. Outlined below is a chronology of the slow and sure evolution of ESK.

Initial efforts for a vibrant Evaluation Body focused on revamping and strengthening the dormant Kenya Evaluation Association (KEA), formed in 1999 and which hosted the first African Evaluation Association (AfrEA) conference. The efforts were a follow-up action on the recommendations of a meeting held by African representatives at the 2008 International Program for Development Evaluation Training (IPDET) in Canada, which the current Chair of ESK, Jennifer Mutua, attended. At the time, she had been seconded by UNPD/UNV to provide technical support to the National Integrated Monitoring and Evaluation System (NIMES). The discussions centred on putting evaluation practice on the continent's national agenda with a special focus on the contributions of professional evaluation associations. Significantly, during the discussions it was noted that the status of the associations on the continent ranged from being weak, dormant or non-existent. Accordingly, there was consensus that since there is no "one fits all" approach to vibrant associations, each country would approach things differently – based on the local context. This should however be informed by the results of a rigorous internal assessment before any model (professional, incorporated bodies, etc.) is adopted.

Subsequently, and based on these recommendations, Jennifer Mutua, with the support of the NIMES and a team of M&E practitioners¹ came together to provide a way forward in operationalizing a vibrant professional evaluation body. Due diligence through an informal internal assessment of whether or not a professional evaluation association existed was conducted. The findings revealed that indeed, there existed KEA. However, it was noted that KEA was dormant. The idea of revamping the dormant KEA was therefore, mooted consultatively as one of the next steps forward. Accordingly, an audience was sought with Karen Odhiambo (KEA chair) and Samuel Wachira (KEA vice chair), who agreed to join the team mentioned above.

The other step forward agreed upon and which was followed through, was the mobilization of other M&E practitioners to join

1 Julius Nyangaga (ILRI); James Mwanzia (Government's NIMES); Samuel Norgah (Plan International); Dr. Florence Etta (consultant); Daudi Sumba (African Wild Life Foundation); Makali Mulu (independent consultant); Rose Muchiri (UNDP); Jan Reilaender (UNICEF); Steve Mogere (JICA); Rekha Shori (consultant); Charles Warria (IIRR); Peter Kimani (University)

the initiative. An old contact list of KEA former members together with other innovative ways such as identifying M&E focal persons in organizations was used to target and invite potential members to meetings. The response was good, albeit with some emails bouncing. Regular meetings for reviving KEA then began in earnest with an average attendance of between 25 to 35 members. At the initial meeting, an interim steering committee was identified and endorsed by the members to spearhead the process of revamping KEA. The Monitoring & Evaluation Directorate (MED), Ministry of State for Planning, National Development and Vision 2030 which operationalizes the NIMES through strategic partnership arrangements with KEA, agreed to provide space for its meetings. This it was agreed would continue until KEA was able to become financially stable.

Another activity that was used to mobilise support for revamping KEA centred on participation in the “Local Country Action” component of the 2009 International Development Evaluation Associations’ (IDEAS) conference, in South Africa. The purpose of this initiative was to consultatively, through focus group discussions, examine the local situation with regard to evaluation capacity. The specific objective was to come up with ideas for “Local Actions” that may contribute to improving capabilities for evaluation of development activities in the country. The areas of focus on this were grouped as follows: “Identify local strengths relevant to evaluation; Identify local barriers to evaluation capacity building and their causes; Discuss how to improve evaluation capacity; Make suggestions for local actions to build evaluation capacity”. This culminated in a report based on Kenya’s local evaluation situation, whose findings were presented in the conference show-casing the NIMES and its newly found KEA partnership. The findings also served from then on to inform the way forward in efforts towards operationalizing a vibrant professional association.

However it is significant to note that, due to unforeseen challenges and after many failed attempts to salvage this, the efforts for reviving KEA became untenable (recorded in minutes of stakeholder meetings). Consequently, in a meeting held by M&E practitioners that included the attendance of the then AfrEA President, Dr. Florence Etta, on 18th June 2010, participants decided to form a new national evaluation body that would serve a local network’s interests. They endorsed the formation of the Evaluation Society of Kenya (ESK). In September 2010 ESK applied to the Registrar of Societies for official registration as a Society. This was officially granted and registered in July 2011 (File No 58739).

As part of the efforts for operationalizing ESK, a constitution and strategic plan were recently developed and ratified consultatively by members. UNICEF and DFID provided technical input into the constitution and strategic plan respectively. It is envisaged that this will now inform the next steps forward in taking ESK to the next level of implementing the strategic plan. In particular this will play a crucial role in guiding the process of providing a united voice by its members into the country's development discourse. Towards this end, as an immediate step forward a draft Annual Work Plan (AWP) has been drawn from the strategic plan. The AWP is being developed consultatively with input and comments from committee members and later the wider ESK membership. In the meantime, quarterly meetings are held for the wider ESK group with an average attendance of between 15-25 members.

Further, the network has two on-line interaction spaces – an e-platform and a website (www.esk.co.ke). The e-platform was established through the support of the professional partners in ODI (in Britain). It is very interactive and members are able to communicate with one another, receive information on job and vacancy announcements and other relevant information (some of which is available the AfrEA, IPDET, IDEAS, XCEval and AGDEN among other international listservs). The ESK website is being finalised with content.

Regionally and globally ESK is slowly and surely gaining recognition. ESK is a member of AfrEA and made a presentation during the 2012 conference in Accra, Ghana. Also its current Chair, Jennifer Mutua, is serving at the AfrEA Board as a representative of Eastern Africa. ESK is also in the IOCE data base and is participating in the global initiative by EvalPartners. A presentation by ESK was also one of the panel discussions made at the 2010 IDEAS conference in Jordan.

Collaboration with government

ESK has continued to receive strong support from the NIMES (Kenya's National Integrated Monitoring and Evaluation System). In November 2012 ESK organised a very successful high visibility launch. The event was organised jointly with the Ministry of Planning through the Monitoring & Evaluation Directorate (MED) within a three-day inaugural national M&E week that is earmarked to be held annually. ESK's launch was on day one. UNICEF Kenya contributed substantially to the funding of the launch.

ESK in partnership with MED and other development partners used this platform to contribute towards the enhancement of the culture and demand for M&E in the country (which is relatively weak currently). It also provided an opportunity to raise the visibility of ESK and the NIMES as instruments for tracking and communicating development results as well as the sharing of experiences and learnings to encourage the culture of dialogue. The theme and agenda of the launch focused on ESK's objectives, strategies and the benefits of having a vibrant professional evaluation society in the country and the role it will play.

Participants were drawn from the national and sub-national levels including CSOs, Government, UN Agencies, Academia and Research institutions among others. The media covered the event. Keynote addresses were made by the assistant Minister for planning, UNICEF's Country Director and DFID's high-level representative from the UK Evaluation Office. Other speeches were made by MED, a representative from UNDP and the ESK chair. During the event, UN Women also conducted a workshop on *"Evaluation from a Gender Equality and Human Rights Perspective"*. The universities also made a presentation on an initiative for developing an M&E curricula that is being supported by MED and UNICEF.

In addition, the National M&E week also included the official launch of a Capacity Development Programme for the NIMES supported by SIDA. Other presentations during the M&E week were made by representatives from the World Bank, Kenya Community of Practice on Managing for Development Results (KCoP-MfDR). Workshops were also conducted by AGDEN and the International Institute of Rural Reconstruction (IRR) among others. The 3-day event provided a platform for a membership recruitment drive for ESK.

Further, in 2010 ESK successfully co-hosted a half-day session with MED to discuss various issues related to M&E in the country. Presentations were made by MED, various universities and ESK on how to collaboratively support the evaluation processes and services for effective development. It was also attended by representatives from UNDP and the World Bank among others. The Society is now in the process of formalizing its relationship with the MED, through an MOU. More ESK/government engagements and collaborations are planned for the future.

Strategy and implementation

Since the initial efforts as outlined above began in late 2008, the operationalization of ESK has come a long way; a process that was sometimes characterised by unexpected challenges. It is also worth noting that the focus was mostly on operational issues in order to set a solid foundation for achieving our overall goal, “Sustainable and quality monitoring and evaluation practice for improving development policies, programs and projects”. Towards this end, the milestones of developing and ratifying a constitution and strategic plan coupled with a formally elected Executive Committee, are some of the steps that ESK has taken to strengthen its own institutional capacity to be able to deliver on the goal. For example, the constitution guided the electoral process and also informed the formulation of the strategic plan.

ESK is now ready to move to the implementation of its strategic plan through a multi-stakeholder approach. This will include collaborations with the government’s NIMES, and development partners such as UNICEF, UNDP and DFID among others. On the conceptual framework for national evaluation capacity development outlined in the book *Moving from policies to results by developing national capacities for country-led M&E systems*, ESK’s strategic objectives and strategies for achieving the identified issues are respectively outlined below.

Objectives and key issues to address

To advance the profession and practice of M&E in Kenya:

- To collaborate and foster understanding with M&E training institutions in order to improve the quality of education and/or capacity building of related professionals;
- To collaborate with similar societies, organisations and allied professionals and establishments within and outside Kenya in the application of M&E;
- To grow the membership of ESK across Kenya and raise the profile of evaluation in Kenya.

To support the development of M&E capacity in Kenya:

- To support the development of M&E programs and educational curriculums that ensure content is adequate to cover intellectual, ethical and professional standards, principles, and practices

and meet national, regional and international research and development needs;

- To promote and publicize appropriate M&E training programs, tools and methodologies;
- To support participation of interested trainers and trainees in M&E capacity development programs.

To support the application of effective M&E in the national development agenda:

- To promote the role of M&E practitioners as integral members of the country's development sector;
- To support the dissemination of evaluation and research findings which have bearing on the national development agenda (Vision 2030).

To measure ESK's effectiveness and progress towards the achievement of the above goal and strategic objectives an M&E framework that includes a set of verifiable indicators is part of the strategic plan.

Strategies

To achieve our goal, we have agreed on a set of strategies and three cross-cutting themes. We believe that the synergies among these strategies and themes will provide an enabling framework for the implementation of our strategic plan and that is indeed in line with the three identified issues by EvalPartners.

Partnerships and collaboration: Working in partnerships and alliances is a growing trend in the way effective organisations operate. In light of this, ESK will identify and form collaborations with relevant stakeholders including the government, academia, development partners, civil society and M&E practitioners. Towards this end, for example, ESK has forged a strategic partnership with the NIMES, which has been up to now at the level of operations as the Society gets on its feet. In forging this partnership, we recognise the window of opportunity this provides us to engage and support the Government. Moreover, now that ESK is in the process of moving to the next level as mentioned above, it is planned and expected that this will now include professional technical M&E input in the tracking of development. The NIMES tracks and provides feedback on the implementation of development policies, programs and projects that are outlined in the country's Medium Term Plan of the Economic Blue Print – *the Vision 2030*.

Recognising the diversity and richness of our membership, we will also draw on the strength of our members in the implementation of this strategy. We will develop thematic and other groups within ESK to facilitate our engagement with topical issues and stakeholders. We will also extend and strengthen our networking and seek collaboration with other evaluation associations; specifically, national associations in Africa, AfrEA and global evaluation associations such as IOCE and EvalPartners. Overall, our search for partnership will be guided by the principles of transparency, complementarity, and mutual respect and shared interest. We would ensure that we adhere to the tenets of the Paris Declaration with respect to our level of collaboration.

Upholding evaluation standards; ESK will work to support and grow the establishment of a credible database of professional evaluators and support the development of guiding evaluation tools and processes whose level of quality will be at par with those set by the wider professional field (IDEAS, AfrEA, IOCE, etc.) for solidly defensible results but sensitive to the national and regional contexts of resource and capacity availability.

Advocacy and lobbying; We recognize the fact that advocacy and lobbying have critical roles to play in the implementation of any strategy. ESK will engage in non-confrontational evidence-based advocacy with the relevant state actors to champion our cause. We will engage in effective lobbying, especially our 'position' on issues related to development in general. We will always engage in dialogue with relevant stakeholders on themes of national and professional interest.

Engaging mainstream media; The use of media will be an integral part of our strategy over the next three years. Recognizing that we need a medium to communicate our analysis and findings, we will work closely with independent media houses both locally and internationally. In engaging with the media, we will ensure that their reportage on our press releases is unbiased and factual. Wherever possible, the leadership of ESK will sign off reports before they are published by the press.

Engaging social media and ICTs; The use of social media in development engagement has become a necessary tool especially when engaging with the youth. The effectiveness of social media and the number of people who socialize on media makes it an important tool in today's development. ESK will integrate elements of social media on our website (www.esk.co.ke) and will also make our presence felt

on sites like Facebook and Twitter. With the increasing number of mobile phone ownership in Kenya, the use of this technology will not only enhance our communication but will also increase our reach.

Capacity development; One of the challenges facing development actors (including government) is the weak capacity in the use of evaluation findings and the general lack of evaluation professionals. This is the direct result of inadequate resources and the lack of clear accountabilities and knowledge within those organizations. In response to this challenge, ESK will support the development of staff capacity in the management of evaluation processes and findings. We will do this through short courses and tailor-made hands-on training by our members. This approach will help to promote the use of M&E information and results both within government and NGOs, thereby inculcating the habit of M&E culture and practice.

Organizational development; In order to sustainably implement our strategic plan, we will put in place systems and structures that will support the implementation and facilitation of various aspects of the strategy. We will put in place a robust M&E system to promote transparency and accountability and also set up work streams in ESK around our core activities.

Cross cutting themes; In addition to the key strategies outlined above, we will also incorporate some cross-cutting themes which in our view will facilitate the effective implementation of our strategic plan. The key themes are: gender, equity and climate change. We also recognise the importance of diversity and resilience as important themes in our operations. In all our analysis we will ensure that data and information is disaggregated by gender and other socio-economic parameters. In our practice, we will ensure that there are systems in place to ensure and support gender equality.

Whether by design or by accident, most development interventions tend to pay lip service to addressing and targeting the most vulnerable in our societies. The midterm review of the MDGs highlighted the issue of exclusion as one of the major threats to the achievement of the MDGs. We would therefore ensure that deliberate efforts are made during our analysis to assess whether the most vulnerable in our societies are targeted and included in governmental development efforts.

We are aware that individuals have rights which need to be protected and respected; we will therefore be circumspect in the analysis and presentation of our findings to ensure that the dignities of people are respected.

Learning and reflection

ESK will promote a culture of learning and reflection on the results of its own activities as well as the results of studies undertaken by the Society and other similar evaluation outfits globally. This will be a key component of our planned activities with state and non-state actors as well as with development partners. ESK will identify opportunities to share M&E findings in various development areas cited above with concerned parties and the general public using various communication platforms (media, ICTs, social media, conferences, workshops, and meetings) in order to foster an environment of improved levels of accountability, transparency and commitment for stated goals and objectives of development actors.

Bottlenecks/challenges

Three key bottlenecks or challenges that hampered our VOPE's capacity to contribute to the above strategy are:

- Weak institutional capacity and budgetary constraints: As outlined above ESK initially had of necessity to focus on operational issues to bring the Society on its feet as opposed to the technical implementation of the strategic plan.
- Time constraints: The absence of a secretariat to do some of the basic office administrative duties. The committee members are all very busy professionals and it was challenging for them as individuals and as a group to make necessary follow-ups.
- Competing responsibilities of members making it difficult to attend meetings in large numbers and other businesses of ESK regularly. A bigger number would bring in issues of economies of scale including ease in financing the organizations activities.

Progress and results

- ESK is formally registered and enjoys the backing of M&E practitioners (more needs to be done though to mobilize more members).
- The government has provided support from inception to date.
- The ESK e-platform is very interactive with members receiving relevant information useful for their career growth such as training and job/consultancy opportunities.

- A constitution and strategic plan have been developed and ratified through a consultative process. One and 3-year draft work plans are currently under consultative preparations.
- A credible electoral process has been conducted and a new committee endorsed by members.
- Some other development partners are showing interest in potential collaborations.
- ESK is slowly and surely gaining regional and global recognition e.g. through being a member of AfrEA and IOCE and the opportunity to participate in this EvalPartners initiative; made presentations in the 2009 (under KEA) and 2010 IDEAS conferences.
- Very strong bond between members will lead to a stronger organization in future.
- A website that is still under construction but being finalised.

Key enabling factors

- A committed team of steering committee members;
- Support from the government's NIMES which boosted our credibility. Also in providing a venue for our meetings as we do not have the resources yet to finance this
- The recognized need for a vibrant professional evaluation body in the country. A positive response from M&E practitioners on the need to belong to a supporting and accessible vibrant professional evaluation organization.

Innovations and lessons learned

- Mobilisation of M&E practitioners who supported the initiative from the start;
- Commitment by steering committee members is very critical to successful operationalization;
- Backing by the government from the onset is important to build credibility of the Society;
- Involving the members through wide consultations and using instant communication channels (e.g. the e-platform) to keep them updated e.g. in the development of a constitution and strategic plan for ownership and goodwill;

- There is a need to now involve other development stakeholders especially for the effective implementation of the strategic plan.

Next steps

Addressing the enabling environment

We recognise that in order to be able to effectively provide professional input into the NIMES, the support and collaborations of other development stakeholders is crucial. Some development partners are showing interest in potential collaborations. UNICEF, DFID and UNDP are some of these. For example UNDP has pledged to support us through the joint UNDP/MED work plan for 2013. All these will be followed up. Specifically the following is planned towards contributing to effective application of M&E in national development:

- Establishment of sector-specific (e.g. education, gender, agriculture, climate change, etc.) thematic working groups for members to join and contribute accordingly. This may include the preparation and presentation of M&E positional papers on topical issues including the national budget and food security;
- Providing professional input into the development of the draft national M&E policy and its related legal framework;
- ESK members' involvement in the NIMES key stakeholders' committees, e.g. the National Steering Committee (NSC), Technical Oversight Committee and the Technical Advisory Groups (TAGs);
- Organize round table discussions and policy dialogue with government technocrats and other policy makers (parliament, cabinet, members of parliament);
- Participate in some sector-specific evaluations jointly with government ministries and prepare and operationalize a communication strategy for the dissemination of the evaluation and research findings;
- Organize/promote/participate in sensitization forums on M&E in collaboration with the government and other relevant stakeholders;
- Engaging the mainstream media, social media and ICTs. This is especially crucial now with the new constitutional dispensation in the country where the citizens are increasingly getting

empowered to participate in the development discourse. In particular the use of social media in development engagement has become a necessary tool especially when engaging with the youth.

Strengthen ESK's own institutional capacities

The efforts of ESK building its institutional capacities has included mobilisation of M&E practitioners to support the building of a vibrant professional evaluation body. The response to a large extent has been positive. Additionally, the consultative development and ratification of the constitution and strategic plan is a build-up to this. The independent electoral process and its endorsement by members has been yet another milestone. The constitution informed the formulation of the strategic plan as well as the electoral process. All these are seen as an integral part of the process of strengthening of ESK's institutional capacities.

With a new leadership team in place, it is expected that the implementation of the strategic plan through annual work plans and partnership building for a multi-stakeholder approach will provide an opportunity for the Society to further strengthen its institutional capacities. For instance, partnerships with academia (among other development partners) in order to promote the translation of theory into practice is one of the planned areas of strategic focus in strengthening the Society's institutional linkages.

We recognise that resource mobilisation is crucial to ESK's sustainability. Some of the plans around this include raising funds from membership fees through a rigorous recruitment drive that includes demonstrating to members the added value of being in ESK. For example, their participation in the planned sector-specific thematic working group will be something to highlight as adding value to strengthening their individual capacities through peer learning and experience sharing as well as being able to contribute towards Kenya's development. It is also planned that other means of resource mobilisation such as through M&E workshops will be explored and executed.

The Society will also support the consultative development of guiding evaluation tools including professional M&E standards and processes whose level of quality will be at par with those set by the wider professional field (IDEAS, AfrEA, IOCE, etc.) for solidly defensible results but sensitive to the national and regional contexts of resource and capacity availability.

In all these, it is recognised that peer learning and experience sharing from other national evaluation professional associations as well as like-minded regional and international organisations on how to strengthen institutional capacities in line with emerging global trends is crucial. The selection of ESK to participate in the EvalPartners International Forum was one such golden opportunity.

What EKS will do to strengthen the capacities of individual evaluators

ESK's e-platform is very interactive and members are able to communicate with one another, receive information on job and vacancy announcements and other relevant information. Most of the relevant information shared in the AfrEA, IPDET, IDEAS, AGDEN, XCEval and other global listservs on evaluation international trainings, consultancies, webinars and conferences are forwarded to the ESK members. Members have been able to apply and participate in all these and thereby contribute to their individual capacity building.

Among the planned priorities in the implementation of the ESK's strategic plan is the development of an easily referenced database of individuals, organizations and institutions involved in M&E within the country and even the East African region. This is to support stakeholders and partners who wish to get a one-stop reference point on where they can access such services. Later systems to screen and vouch for quality of M&E service may be added but this will require wide consultations and the development of a widely acceptable process and product.

One of the challenges facing development actors (including government) is the weak capacity in the use of evaluation findings and the general lack of evaluation professionals. This is the direct result of inadequate resources and the lack of clear accountabilities and knowledge within those organizations. In response to this challenge, ESK will support the development of members' capacity in the management of evaluation processes and findings. We will do this through short courses and tailor-made hands-on training for our members. This approach will help to promote the use of M&E information and results both within government and NGOs, thereby inculcating the habit of M&E culture and practice. Moreover, it is also expected that through individual participation in the sector-specific thematic working groups planned by ESK for its members, this will provide an opportunity for peer learning and experience sharing and, thereby, contribute towards the strengthening of capacities at that level.

KYRGYZ REPUBLIC (KYRGYZSTAN): THE NATIONAL MONITORING AND EVALUATION NETWORK OF THE KYRGYZ REPUBLIC

Tatiana Tretiakova

Network Coordinator

Background

The establishment of the Kyrgyz M&E Network in 2007 was pre-conditioned by several historic events that took place in Kyrgyzstan (official country name: “Kyrgyz Republic”) over the past twenty years. The first major shift occurred when the country gained independence in 1991 after the collapse of the Soviet Union. As an independent nation, Kyrgyzstan had to start the process of strategic planning at various levels of public administration. Both the first country development plan (National Poverty Reduction Strategy – NPRS – 2002-2005) and the second strategic policy document (Country Development Strategy, CDS, 2006-2008) contained monitoring and evaluation sections. More importantly, both of these strategic policy documents were developed with the participation of civil society organizations.

In 2005, after the completion of the first country development plan, the government reported that poverty in the country had declined from 67% to 45% (or even to 37%, according to some sources). However, the question was which specific results in the field of poverty reduction could really be attributed to this particular program? This led directly to the issue of monitoring and evaluation of program performance, which was also raised in the context of the involvement of civil society organizations in the formulation of the Country Development Strategy (2006-2008). In the process of such public discussions, a number of civil society organizations realized and agreed that a coordinated approach to monitoring and evaluation was necessary.

In 2006 a study of M&E services in the country was conducted, which recommended: a) building the capacity of civil society organi-

zations for monitoring and evaluating country development programs and policies; and b) establishing a professional evaluation organization that would be able to lobby evaluation issues and contribute to reform efforts in an organized manner. The findings of the study were presented at the M&E conference that was organized by the Soros Foundation Kyrgyzstan and attended by representatives of civil society, the government as well as international donors. That conference helped to identify the main issues and needs in terms of cooperation between the state and the civil society, in particular improving government transparency and developing an evaluative culture to ensure good governance in the public administration.

In the fall of 2007 a general meeting of organizations and individuals working in the evaluation sector was held in Bishkek, the capital of Kyrgyzstan. Participants of the meeting decided to establish the National Network of Monitoring and Evaluation, formulated and approved the founding documents of the Network and identified main areas of work. A mailing list was created for convenient communication among Network members. The main objective of the Network was identified as building cooperation and communication procedures between the civil society and the public authorities (the government).

On the basis of this objective, the Network organized events that engaged both civil society and government representatives. However, the high degree of instability in the country¹ over the past seven years has resulted in a continuous turnover of civil servants and in constantly changing structures of government bodies, which has made it difficult to institutionalize cooperation and partnership efforts in the field of evaluation.

As a result of this period, one can say that the main reason for the creation of the Kyrgyz M&E Network has been the need to establish a sustainable system of interaction between professional organizations, government agencies, and other interest groups with the aim of improving the effectiveness of public administration through introduction and use of M&E at all levels.

1 In 2005, a first coup d'état took place, resulting in a subsequent change of government and president; 2008 saw a radical reform of the government, a major structural overhaul and changes of many civil servants; 2010 finally saw a second revolution, resulting in a shift from presidential to parliamentary form of governance, followed by major ethnic unrests. Since 2010 Head of Government has changed three times already.

Activities

The Network's activities helped all its participants to contribute to the creation of a sustainable country- and sector-level M&E system, and become part of international and regional M&E communities. Apart from this, the Network served as a platform for information sharing and knowledge dissemination and offered opportunities for participation in various studies, programs and projects.

Initially the Network was founded by 26 organizations. At present, eleven organizational members act as active key players and are involved in policy making in various sectors and fields. The mailing list includes 64 organizations and individual experts. Initially, the structure of the Network was envisaged without a central Board of Directors. However, since 2009 this issue has been raised several times, and at present the issue of creating a Board of Directors with engagement of government representatives is being considered.

Strategy and Implementation

The mission statement formulated during establishment of the Network in 2007 was "to build the institution of professional evaluation and expertise in the Kyrgyz Republic."

The Network's long-term goals include the following:

- Strengthen and promote professional evaluation and expertise as important mechanisms of raising effectiveness of social projects and programs;
- Contribute to the creation of conditions for evaluation of programs and projects in Kyrgyzstan; and
- Raise the quality of the implementation of socio-economic projects and programs in Kyrgyzstan.

Supporting the establishment of a country-level M&E system

Since 2007 there have been annual country-level events aimed at discussing ways to implement the Network's goals and objectives. Activities were conducted where key ministries and agencies of Kyrgyzstan² participated together with representatives of civil society and of the National M&E Network. Recommendations from these events were usually included in the policy formulation of the

2 Ministry of Economic Development, Ministry of Health, Ministry of Education, Chamber of Accounts, National Statistics Committee.

respective agencies, with Network members participating in the formulation.

At the initiative of Network members and with the support of the UNICEF country office in Kyrgyzstan, Kyrgyz government representatives were able to take part in annual IPEN regional (CIS) conferences that transformed them into supporters of results-based management as well as advocates of evaluation in their respective agencies.

In order to raise the capacity and improve information sharing among M&E specialists, the Network regularly organizes peer-to-peer meetings on the discussion of evaluation instruments and methods. Occasionally these meetings included international experts who were available for *pro bono* consultations to the Network. Some of the most interesting discussions during these meetings included those with Ian Grant, an expert of the European Commission, who spoke of the importance of developing the institutional capacity of government agencies to commission and utilize evaluation in decision-making processes; and Dr. McConnick, an expert evaluating the UNDP Poverty Program in Kyrgyzstan, who advised the Network to regularly monitor or evaluate certain economically or socially important issues and present them to interested parties in order to improve awareness of the Network's potential and the quality of services that its members can offer.

Network members participated in development and publication of two methodological guidelines on evaluation issues supported by UNICEF Kyrgyzstan and Soros Foundation Kyrgyzstan. The guidelines were presented to partner organizations and the Government and were well received, in particular because they address the general scarcity of M&E-related materials and publications in the Russian language.

In 2011 Network members initiated the production of two papers analyzing the legal and institutional environment for evaluation in Kyrgyzstan, as well as the possibility for civil society's participation in policy evaluation. These analytical briefs were submitted to the national Parliament and Government for consideration.

In 2011, after the April 2010 violent events in the country and the subsequent complete overhaul of the government, Network members took part in formulation of the 'government evaluation method-

ology'. The methodology was approved by government resolution.³ At present, the efforts of the Network focus on how to implement this methodology in such a way that evaluation results would be used in decision making. Negotiations are underway on ways of building institutional connections among government and civil society bodies in the formulation and evaluation of government programs.

Training and capacity building

Apart from activities aimed at building a country-level evaluation system, the Network tries to raise the capacities of Network members. In March 2011, 24 Network members participated in a two-month webinar on "Results-Based Management and Evaluation" conducted by British evaluation expert Freer Spreckley. In 2010, the Kyrgyz M&E Network organized and conducted online training events as part of the annual IPEN conference that brought together around 80 participants from civil society, think tanks, international donor agencies, and government agencies.

Other events included workshops in 2011 for NGOs that took part in monitoring humanitarian aid in the city of Osh and the surrounding region that had suffered from inter-ethnic violence in June 2010. The training was conducted for 27 members of NGOs based in the southern regions of Osh and Djalal-Abad with support from Soros Foundation Kyrgyzstan. Four Network members took part in training events as well.

Five members of the Network took part in Donna Mertens' workshop "Transformative Mixed Methods Evaluation" that was organized in Kazakhstan by UN Women and IPEN in 2011. Each of these five participants from the Kyrgyz M&E Network later made presentations for other Network members, experts on organizational diagnostics and gender issues, and held a number of meetings on popularization of transformative mixed methods.

Information Sharing

Apart from this, Network members regularly receive information about in-country and out-of country capacity building events and opportunities.

3 Government Resolution no.105 of 17 February, 2012 "Evaluating effectiveness of government bodies in the executive branch and local self-government agencies in the Kyrgyz Republic", <http://www.gov.kg/?p=7889> (description of general methodology in Russian language).

Gender Evaluation

Activities in the field of gender evaluation included the 2009 study on the state of gender evaluation in the country. The study helped to identify burning issues and recommended the creation of an evaluation system in the country that would make it possible to conduct comprehensive gender evaluations. At present, gender evaluation activities predominantly focus on raising qualification and capacity of NGOs, conducting of information events and promoting transformative mixed method evaluation.

Besides, Network members individually conduct various activities for the promotion of evaluation in government agencies, and at present the discussion focuses on how to coordinate and institutionalize these efforts.

Institutional Capacity

There is a central Council of Network members who are in charge of various Network activities and are active participants of strategic and operational discussions and projects. In terms of institutional capacity, this Council is currently considering creating a Board of Directors with the participation of government and parliament representatives.

Challenges

Limited institutionalization: The goals that the Network set for itself require a relatively high degree of organization. However, in practice the leading network members of the Network are NGOs and research centers who can contribute only a very limited amount of time to volunteer work. Besides, the continuous turnover in government and state institutions results in a slide-back where achievements of earlier stages that have been successfully discussed and agreed with the previous government are easily lost. In the light of this, it has become ever more important to structure the work of the Network so that it can contribute to institutionalization and continue transforming the outputs of previous stages into decisions and results at the next stages (such as regulations requiring constructive response and feedback).

Lack of a clear strategy that would unite all Network members: Even though the mailing list includes quite a number of people, they all have diverse goals, limited capacity and readiness to be included in decision-making processes, policy formulation and con-

sulting. For this reason their participation is very limited and many are inactive.

Lack of a Public Relations strategy of the Network: Another major issue is the limited public awareness of the Network's activities and goals in various sectors of society. Existing network products and resources are available only to a limited circle of people included in the mailing list and through personal connections. This results in underuse of the Network's capacity by government agencies and in the lack of a systemic approach to cooperation and partnership.

Progress and Results

Progress and results to date include the following:

- The Network represents collective interests of various institutions and individuals in the field of M&E.
- The Network presents a platform for information sharing and the professional strengthening of network members.
- The Network represents Kyrgyzstan in the international arena in the field of M&E.
- Network members actively take part in forming the country-level M&E system and in the evaluation of government performance.
- Network members have managed to establish constructive contact with ever-changing government bodies (Government, President's Office) and maintain communication with key ministries.
- The regional coverage of Network members has improved and now includes representatives from various provinces of Kyrgyzstan.
- Network members use the skills and knowledge that they receive through Network training events to implement their own contracts, projects and programs in the field of M&E.
- In addition to Kyrgyzstan-based evaluators, the Network's mailing list includes evaluators from neighboring Tajikistan and Kazakhstan.

Key Enabling Factors

- A group of active Network members who actively participate in most Network initiatives on a volunteer basis;
- Relatively open and cooperative government bodies with interest in M&E issues;
- Fruitful informal partnerships with international M&E experts; and
- Sufficiently high unsatisfied demand for M&E activities;
- Active and dynamic civil society in the country;
- Supportive donor agencies (such as Soros Foundation, UNICEF).

Agenda for the next development phase

- Build a clear communication and partnership strategy with government, wider civil society and interest groups, taking the diverse interests of Network members into account;
- Active integration into international M&E initiatives;
- Develop a PR and awareness building strategy about Network activities;
- Formulate and implement M&E standards;
- Improve fund-raising activities considering the 'soft' nature of the Network's activities.

Innovations and lessons learned

Network members have accumulated and are willing to share experience in the following areas:

- Forms and methods of interaction with government agencies;
- Practical M&E of conflict and post-conflict situations (building in particular on the experience of the 2010 interethnic clashes in the south of Kyrgyzstan);
- Participatory monitoring of municipal land use (local self-government bodies and local nongovernmental organizations, such as in the case of inventory of municipal land in Osh city);

- Evaluating public satisfaction with infrastructure provision (monitoring and evaluating the effectiveness and efficiency of local budget allocation and usage, such as in the case of the “clean water” line item);
- Gender-sensitive performance analysis of government bodies (evaluating the operationalization of M&E systems, audits, the formulation of plans and development strategies at various levels of public administration).

Next steps

- Continue partnership initiatives with the Government, Parliament and local self-government bodies on the introduction of M&E in management processes; support introduction of results-based management and M&E.
- Continue offering capacity building activities for Network members.
- Expand and strengthen membership in the Network.
- Develop methods to improve the M&E skills for network members, government officials and interested persons.
- Promote equality evaluations and transformative Mixed Methods Evaluation in donor-funded project evaluations.
- Continue participating in international M&E initiatives.

The National M&E network is an integrative self-organized volunteer platform of organizations and individual experts who are interested in promoting M&E issues and who use M&E principles and instruments in their activities. The Network plans to improve its institutional capacity and make it part of the Network’s development strategy.

MOROCCO: ASSOCIATION MAROCAINE DE L'EVALUATION (AME) = MOROCCAN EVALUATION ASSOCIATION (MEA)

MOVING FROM THE INCLUSION OF EVALUATION OF PUBLIC POLICIES IN THE NATIONAL CONSTITUTION TO THE INSTITUTIONALIZATION OF THE FUNCTION OF EVALUATION IN MOROCCO

Prof. Ahmed Bencheikh
MEA President

Background

General context

The year 2012 marked the fourth year history in the Moroccan Evaluation Association (MEA). Founded in 2008, the MEA is today a dynamic and active leading evaluation of association in the Arab World.

2012 was also the year of the scalability of its activities as defined by the new Strategic Plan for 2011-2013 following the inclusion within the new Constitution of Morocco of the principle of evaluation of public policies (July 2011). The MEA contributed significantly to this huge "constitutionalization" undertaking in Morocco.

The visionary ambition of its founders and its dynamism has confirmed the MEA as an important international player in evaluation. Indeed, the International Jury of the 6th Conference organized by the African Evaluation Association (AfrEA) in Accra (Ghana) in January, 2012, awarded the first prize "African Development Prize" to MEA for the project "*Initiative for the institutionalization of development evaluation in Morocco: a process to build, and challenges*".

The successful record of MEA in these last four years presents new challenges and, most importantly, new responsibilities.

In addition to influencing the process of institutionalization of evaluation of public policies in Morocco, MEA has set important priorities for the three years of 2011, 2012 and 2013. Alongside the regular organization of public debates on public policy evaluation, the association puts focus on capacity building in evaluation, both at national and local levels. In addition, the MEA must also reinforce accountability (linked to responsibility), particularly through the values of transparency and accountability.

Before the creation of the evaluation association in Morocco, a number of its founding members participated in several meetings dedicated to monitoring and evaluation in the country and abroad. They participated in their capacities of either practitioners or dealing with evaluation in their occupation. Some of these, as university teachers or government civil servants, have been granted support from international organizations to attend workshops where evaluation was addressed. Besides these meetings, one of the future members, now President of the MEA, Prof. Ahmed Bencheikh, has had the chance to attend some evaluation associations workshops in Europe and Africa, particularly AfrEA where he realized among its member countries that Morocco had been absent. From that day, he decided to talk to colleagues and friends until the idea came through and the Moroccan Evaluation Association (MEA) was created.

Ten major dates (Historical development)

1995: *The first World Bank Meta-evaluation*

Late King Hassan II asked WB to establish a meta-evaluation of the major problems of Morocco.

2005: *The report of the 50th anniversary of human development*

The Report on the 50th Celebration of Moroccan Independence explicitly noted that “Public policies of Officials and elected members have not always been evaluated, nor readjusted regarding their impact on population welfare”.

Box 1: MEA mission

The mission of the Moroccan Evaluation Association is to contribute to improving public action through the promotion of the evaluation culture and its institutionalization in Morocco.

Source: MEA statutes, 2008.

2008: *The Moroccan Evaluation Association was founded*

A small committee of five members set up the conditions for the formal establishment of MEA: Concept paper, statutes, administrative procedures, press release, etc. The committee organized a general constituent assembly on December 19, 2008. 45 founding members attended the meeting.

2009: *Towards evaluation constitutionalization*

The President of MEA had a number of interviews with some media (the press) explaining the urgent need of the evaluation constitutionalization (inclusion of evaluation in the constitution).

2011, year of major changes

- MEA General Assembly adopted its new strategic plan (2011-2013) which established the constitutionalization of the evaluation of public policies as a strategic priority.
- Arab Spring events started in Morocco.
- The King Mohamed VI, in a historical speech, focuses on the relationship between responsibility and accountability.
- MEA presents its memorandum to the Commission for the revision of the Constitution requiring the constitutionalization of accountability and evaluation of public policies.
- Morocco adopted the principle of evaluation of public policies in its Constitution.

Box 2: MEA commitments

- MEA is committed to promoting awareness of the determinant character of M&E in the strategies of development of public policies;
- Increasing public debate on evaluation practices and their impact on development;
- Reinforcing the evaluation community in Morocco through acquisition of specific skills in M&E;
- Advocacy on behalf of the institutionalization of the evaluation of public policies in Morocco.

Source: MEA statutes, 2008.

Box 3: New Moroccan Constitution (2011)

«Parliament exercises legislative power. It votes laws, controls Government action and ***evaluates public policies***».

Source: Royaume du Maroc, Constitution, article 70.

May 2012

MEA organized the first workshop in favour of members of Moroccan Parliament on the theme: "Political accountability and evaluation of public policies".

Driving forces

The creation and success of MEA were facilitated by two driving forces as described in the following categories:

External driving forces:

- The context of political reforms that Morocco knew before the death of King Hassan II and the accession of King Mohammed VI (from 1999).
- The added value concerning the creation of an NGO (among the thousands of Moroccan NGOs) dedicated to accountability and evaluation of public policies in Morocco.
- The impetus given by the "Arab Spring" in Morocco (February 20 movement) constitutional reforms helped bring the initiative of MEA in the heart of policy changes (link between responsibility and accountability).

Internal driving forces:

- The vision of the President and founding members of the MEA to launch an organization that would promote the principle of accountability in Morocco on the basis of promoting the culture of evaluation.
- The transferable skills confirmed several executive board members and several members to contribute to support the MEA in its action.
- The credibility gained during the current experience of the MEA in advocating for the institutionalization of the evaluation function, including inclusion of the constitutional principle of accountability and evaluation of public policies (Constitution of Morocco, July 1, 2011).

The key players

The founding members of MEA chose a broad representation of key players working and / or interested in evaluation in Morocco, including university professors and researchers, public administration officers, civil society/ NGOs, independent consultants, UN and international organisations.

MEA is led by a board (governing body) composed of nine elected members.

Strategy and Implementation

MEA contributes to strengthen an enabling environment for culture and practice of evaluation in Morocco

In line with Strategic Priorities 1 and 2 of MEA Action Plan 2011-2013:

SP 1: *Promotion of public debate on the constitutionalisation of public policies evaluation in Morocco.*

SP 2: *Accompanying the process of institutionalizing the function of evaluation in Parliament, in public administration and local government (Region, municipality, etc.).*

Since its inception, MEA has decided to adapt its plea on the institutionalization of evaluation based on conditions in the same context of political reforms in Morocco since the 90s. To make more effective its approach, MEA is based on two types of strategies:

- *Leverage strategy* (2009-2011)
- *Focused strategy* (2011-2013)

From the leverage strategy (2009-2011)

From 2009 to 2011, MEA developed a strategy of leverage to create the conditions to positively influence the context of evaluation and accountability in Morocco. This strategy has had support for its plea on the choice of the elements favourable to the development of evaluation in Morocco. Few in number, but largely significant, these elements can be summarized in the following:

- The Royal speeches on evaluation, including public policies, and other reports: Various political declarations have been announced these last years on evaluation institutionalization in Morocco, namely by King Mohammed VI. The numerous official political declarations announced by the King in his speeches, particularly on the Throne Celebration Day, underline the importance of evaluating public policies in the country and the need to set up instances and mechanisms of monitoring, control and evaluation. Besides, the Report on the 50th Celebration of Moroccan Independence explicitly

noted that “Public policies of officials and elected members have not always been evaluated, nor readjusted regarding their impact on population welfare”.

- The government's position on issues of control, monitoring and evaluation: On 30 June 2008, the program action announced that the Government of Morocco “will adopt strategic planning of all its program actions (...). This strategy will be reinforced by setting mechanisms of monitoring, control and evaluation in framework of good governance”.
- The rudimentary and nascent practice of evaluation in some institutions of the Moroccan State: In fact, it is true that some measures have been taken by the government leading to institutionalize public policies evaluation as can be shown below:
 - (i) Creation of the National Evaluation Instance within the Education Higher Council;
 - (ii) Mandating the National Observatory of Human Development (ONDH) to evaluate achievements of the National Initiative of Human development (INDH);
 - (iii) Establishing M&E mechanisms within certain public administrations (Social Development Agency, Ministry of Equipment and Transport, etc.).

MEA has contributed to the creation of an enabling environment for the development of the culture of evaluation based on these policies. This strategy was combined with openness of the media to communicate the actions of MEA.

Towards a focused strategy (2011-2013)

However, the engaged initiatives, for the meantime limited, do not yet allow speaking about a real structured process of evaluative functions. Among the limits, we can mention the following:

- Absence of evaluation institutional dispositions within the Prime Minister's Cabinet and the Parliament, in charge of appreciating current or emerging development sector strategies;
- Evaluation practice in Morocco has little incidence on the redefinition of public action;
- Lack of knowledge of the requirements of evaluative steps, particularly independence and credibility;

- The evaluation practice deals primarily with special projects and programs (i.e. National Initiative of Human Development, United Nations System, World Bank, etc...
- Difficult access to data;
- Absence of scientific research in the field of public policies evaluation.

In fact, the evaluative culture in the Moroccan politico-institutional landscape is still at its beginning. Except for some sectorial mechanisms for information collection, effective evaluation works remain very rare and are not rendered public. However, this situation will certainly improve thanks to the New Constitution of July 2011 where the term of evaluation is cited nine times and appears as one of the key thematic on which the State focuses its ambitions in order to renovate public affairs management. Later on, we will see how the MEA played a significant role in advocating for the constitutionalization of evaluation.

After inclusion of the principle of public policy evaluation in the new Constitution of Morocco, MEA has a focused strategy based on evaluation and the conditions of its implementation. MEA is aware that the new strategy of the association must be focused, that is to say long-term and adaptive, sustained efforts and significant resources. This strategy will focus on a set of complementary actions:

- The principle of mandatory evaluation of public policies of both the State and territorial communes be inscribed in the New Moroccan Constitution;
- From now to 2013, the function of monitoring and evaluation will be organized within the future Parliament, Head of Government's Cabinet and public administrations and territorial communes (within the framework of the advanced regionalization, already in place);
- During the Moroccan Evaluation Week (SME 12 October 2012) the results of the study on evaluative function in Morocco was shared with participants and guests;
- Capacities of the Association's members and key partners will be reinforced through training workshops;
- Institutional and operational capacities of MEA will be reinforced;

- The content of MEA's website is transformed into an information space for exchange and sharing on evaluation issues in Morocco and abroad;
- The Centre for Development Evaluation resources will be able to provide research services on training and capacity building, in the field of monitoring and evaluation, according to international norms of quality.

MEA actions to enhance individual capacities

In line with Strategic Priorities 3 and 5 of MEA Action Plan 2011-2013:

SP 3: Organization of the Second Moroccan Evaluation Week (SME12, October 2012).

*SP 5: Creation of the Centre for Development Evaluation Resources (CDER/CRED):
(i) providing evaluation training and (ii) promoting Research in Development Evaluation.*

- The SME10 included training to help strengthen national capacity assessment in Morocco. Four training workshops of two days brought together about 83 participants including 34% women. International experts in monitoring and evaluation led these workshops. These included Jean Serge Quesnel, Marie Gervais, Eric Monier and Denis Paillard.
- One day was devoted to a working group on "Criteria, norms, standards and ethical considerations" This workshop brought together 28 participants including 46% women. This workshop was facilitated by Prof. Ahmed Bencheikh and Mr Hicham Ait Mansour, UNICEF M&E Officer.
- During the SME12, MEA repeated the same experience and expand training and capacity building in evaluation. A workshop for exchange and sharing focused on the topic: "What are the professional requirements for the practice of evaluation in Morocco?"

Strengthening equity-focused and gender-sensitive evaluation systems and evaluations

In line with Strategic Priorities 1 and 2 of MEA Action Plan 2011-2013:

SP2: *Accompanying the process of institutionalizing the function of evaluation in Parliament, in public administration and local government (Region, municipality, etc.).*

SP 3: *Organization of the Second Moroccan Evaluation Week (SME12, October 2012).*

SP 5: *Creation of the Centre for Development Evaluation Resources (CDER/CRED): (i) providing evaluation training and (ii) promoting Research in Development Evaluation.*

First, it is worth mentioning that MEA put parity between men and women in its statutes: "(...) *The executive board of the association is composed by promoting gender equity.*" (Article 13 of MEA statutes).

MEA has contributed to:

- MEA's participation in official steering committees and validation of evaluation of social policies in Morocco (2009, 2010).
- MEA was selected as member of the scientific committee of "International Conference of Experts on the measurement and policy approaches to improve equity for the new generation in MENA" (Rabat, Morocco, May, 2012). The MENA-UNICEF and National Observatory organized this conference for Child Rights (Rabat, Morocco).
- Prof. Ahmed Bencheikh represented MEA within this scientific committee. He presented a scientific contribution entitled: "What methodological and ethical requirements to assess equity in social policy in Morocco?" International Conference of Experts on the measurement and policy approaches to improve equity for the new generation in MENA (Skhirat, Morocco, May, 2012).
- MEA scheduled a panel during the SME12 (October 2012) on "Gender and Evaluation".
- The equity-focused and gender-sensitive components will be integrated into regular activities of CRED and the process of institutionalization of evaluation function in Morocco.

Strengthening MEA institutional capacity

In line with Strategic Priorities 1 and 2 of MEA Action Plan 2011-2013:

SP 3: *Organization of the Second Moroccan second Evaluation Week (SME12, October 2012).*

SP4: *Reinforcement of institutional and operational capacities of the Moroccan Evaluation Association.*

SP 5: *Creation of the Centre for Development Evaluation Resources (CDER/CRED): (i) providing evaluation training and (ii) promoting Research in Development Evaluation.*

The General Assembly (January 2011) set MEA strategic priorities for the next three years (2011-2013). This second phase of life is characterized by the association: increased resources, particularly the urgent need to strengthen its institutional capacity.

MEA is committed to strengthening institutional capacity through three complementary initiatives:

Governance and internal management of the MEA

MEA is committed to the professionalization of its management and governance of its strategic action plan for 2011-2013. This choice was imposed on MEA due to the breadth and diversity of its operations and its financial and institutional partnerships. It became therefore necessary to opt for structuring internal management and organize the roles and responsibilities of members the boards of MEA.

Three decisions were made and are being tested since the last annual general elective MEA (May 24, 2012).

1. Organization roles and responsibilities of members of the executive board by creating two committees: (i) Committee of financial and accounting organization and (ii) Committee of the administrative organization.
2. Management of strategic issues by volunteers of the executive board according to their interests and availability.
3. Management team: MEA has established a task team made up of a program coordinator and an administrative and financial assistant.

Finally, MEA prepared internal rules to be adopted at the General Assembly meeting in October 2012.

The purpose of the internal rules is to better organize the roles and responsibilities of the executive board members, relationships with members and partners, norms, and ethical standards to meet, etc.

Fundraising and institutional partnerships funds for the realization of the Action Plan (2011-2013) of MEA

The President of MEA worked strongly for raising funds to enable the association to be in condition to perform its mission and achieve its strategic priorities. Moreover, he developed relationships with several organizations dedicated institutional evaluation in the world. The following table gives an idea of the work done since 2010.

<i>Relationships with other organizations</i>	
<i>Memberships</i>	<i>Partnerships</i>
AfrEA: institutional member	UNICEF, Rabat, Morocco
EvalMENA: member founder	European Union, Rabat, Morocco
RFE: member founder	International Development Research Centre (IDRC), Cairo, Egypt
IOCE: member	<i>Agència Catalana de Cooperació al Desenvolupament (ACCD), Barcelona, Spain</i>
IDEAS: member	<i>Observatoire Naional de Développement Humain, Rabat, Morocco</i>
	<i>Observatoire National des Droits de l'Enfant, Rabat, Morocco</i>

Structuring and sustaining activities of the MEA

(Training and research in development evaluation)

The establishment of the Evaluation of Development Resources Center EDRC/ *Centre de Ressources en Evaluation de Développement (CRED)* responds to the need for MEA to have a permanent structure for training and research in the field of development evaluation.

The main objectives are: (i) providing training in M&E, and managing for development results (MfDR) (ii) to help strengthen the quality of evaluation work in Morocco and (iii) promote action research

on various methods and advances focused on equity-focused and gender-sensitive evaluation systems and evaluations.

Bottlenecks and challenges

Some of the key challenges that hampered our VOPE's capacity to contribute to the above strategy include the following:

1. The importance of activities and change of scale in organizing the MEA;
2. The professional work of the MEA;
3. The expectations of other actors of Moroccan society in terms of the evaluation of public policies in Morocco (Parliament, regions, civil society, women, youth, etc.);
4. The limited resources allocated for the functioning of the association.

Progress and Results

Advocacy for the Constitutionalization of public policies and institutionalization of the function of evaluation. Since its inception, the MEA has regularly advocated for the Constitutionalization of public policies evaluation through various national and international forums. On the other hand, MEA has regularly advocated the function of evaluation and the accountability in Morocco and abroad. (See lists of activities cited above).

Documents sharing

MEA shared its documents (bylaws, conceptual document, strategic plan, memorandum, etc.) with other countries and networks, including Algeria, Niger, Tunisia, Senegal and Mauritania.

Support for formalization and capacity building

In 2010 MEA supported the (non-formal) Yemenite Evaluation Society (YES) through two actions:

Workshop 1: Formalization of YES (bylaws, conceptual document, strategic plan).

Workshop 2: Capacity building in norms and standards of evaluation.

Key Enabling Factors

The main strengths of MEA are:

1. Leadership and the belief of some founding members of MEA.
2. The experience and commitment of the current leadership of MEA to work deeply and continuously.
3. The credibility gained by our association during the current experience in advocacy on the institutionalization of the evaluation function in Morocco.

Innovations and Lessons Learnt

1. A passion among a group of citizens engaged in the cause to be carried by the VOPE they want to develop.
2. A voluntary commitment of the founding members is essential for a successful VOPE.
3. It takes a very thorough job and methodical to ensure sustainability and continuity of VOPEs.

Next Steps

General Meeting of MEA (January 15, 2011) brought about strategic priorities for the next three years (2011-2013).

- Accompanying the process of institutionalizing the function of evaluation in Parliament, in public administration and local government (Region, municipality, etc.).
- Reinforcement of institutional and operational capacities of the Moroccan Evaluation Association.
- Creation of the Centre for Development Evaluation Resources (CDER/CRED): (i) providing evaluation training and (ii) promoting Research in Development Evaluation.

NEW ZEALAND: AOTEAROA NEW ZEALAND EVALUATION ASSOCIATION (anzea)

STRENGTHENING THE REPRESENTATION OF INDIGENOUS AND SOUTH PACIFIC VOICES IN EVALUATION

Kate McKegg

anzea Convenor

Background

The Aotearoa New Zealand Evaluation Association (**anzea**) was established in 2006 by an enthusiastic group of New Zealand evaluators who had met regularly since 2003 to discuss and develop the concept of a national association. Significant key players in the association's conception and development were Pam Oliver, Kate McKegg, Maggie Jakob-Hoff, Geoff Stone, Michele Lennan, Michael Blewden, Laurie Porima, Tania Wolfgramm and Jacqui Henry.

The new association was set up with a governing board of 12 members that consists of: Convenor, Deputy Convenor, Secretary, Treasurer, Membership Secretary, and seven (7) general Board members. The association has a relatively large board, compared to some non-government organisations in New Zealand. It was considered vital to have the representation of key groups in New Zealand society on the association's governing body. The constitution makes reference to ensuring representation of Māori, Pacific people, migrants and the community, as well as to striving to achieve a gender balance on the board, and on committees and sub committees of the board.

The main goals of **anzea** are to:

- **Promote and facilitate the development of evaluation practices and standards** which are relevant to Aotearoa New Zealand, with particular reference to the principles and obligations established by Te Tiriti o Waitangi (Treaty of Waitangi)

and reflecting the unique bi-cultural context of Aotearoa New Zealand, while also providing a framework from which multiculturalism can be embraced and responded to.

- **Promote excellence in evaluation** in Aotearoa New Zealand, with a focus on the maintenance of appropriate ethical standards for the profession; the development of evaluation as a skilled practice, a craft requiring methodological appropriateness and quality; and supporting evaluation as a learning and change strategy, and the role of evaluators in informing any change process across policy and programme development and implementation.
- **Facilitate debate and exchange of ideas and dissemination of knowledge** in the practice of evaluation through the provision of meetings, conferences, professional development, education and training events, newsletters and other publications, and other activities.

Until the mid-2000s, an annual national meeting of evaluators – in New Zealand – did not occur regularly. Until **anzea's** formation, the professional evaluation association for New Zealand evaluators was the Australasian Evaluation Society (AES). Once every seven years or so, the AES holds its annual conference in New Zealand, but apart from this event, there were no other annual meetings of evaluators in New Zealand. The benefits of coming together to share New Zealand evaluation practice, theory, issues and opportunities at a national meeting were starkly evident to a growing body of New Zealand evaluators, when in 2003 the AES held their annual conference in Auckland, New Zealand. We realized there were many New Zealand evaluators and other community based stakeholders who had never before accessed the AES conferences due to cost barriers, and were therefore missing out on important professional development opportunities.

Furthermore, the 2003 AES conference was a very New Zealand style of conference, with a strong emphasis on ensuring the participation, access, voice, and leadership of Maori and Pacific evaluators. Our cultural differences to Australia were never more evident than at this conference. This conference experience created the motivation we needed to begin discussing the development of our own national association.

From 2003–2006 evaluators throughout Aotearoa New Zealand debated the need, value, and feasibility of establishing an Aotearoa New Zealand professional body for evaluators. A consistent theme in the discussion was the view that it was appropriate and timely to

establish an evaluation organization which explicitly acknowledges Te Tiriti o Waitangi (The Treaty of Waitangi – this treaty is the founding constitutional document of the country; signed between Māori tribes of Aotearoa and the British Crown in 1840) and the specific bicultural and multi-cultural context of Aotearoa New Zealand. Many could see value in having an association able to support the development of practice frameworks (e.g. evaluation standards, ethics, etc.), which explicitly acknowledge the uniqueness of the cultural context and practice of evaluation in Aotearoa New Zealand.

In the NZ context, while a range of organisations already existed, providing varying kinds of professional support to local evaluators¹, advocates for the establishment of a national association felt that such an organisation would better serve and represent the unique values, needs, obligations and working context of Aotearoa New Zealand evaluators.

Through workshops and stakeholder consultations were held over several months, New Zealand evaluators identified a range of needs that an organisation like **anzea** could meet.

These included, but were not limited to:

- providing leadership on professional accountability, standards and quality practice (i.e. through the development and dissemination of practice standards, professional competencies and training for commissioners, evaluators, and users)
- the further development and enhancement of evaluation models, frameworks, theories and practices that pertain to Aotearoa New Zealand
- provision of mentoring support to evaluators
- stimulation and support to further evaluation groups throughout the country
- enhanced information and knowledge sharing between the evaluation community (e.g. management of web-based resources and case-studies for evaluators)
- brokerage and relationship development between the government as the primary purchaser of evaluation in Aotearoa New Zealand and professional evaluators

1 Including (in alphabetical order): American Evaluation Association; Association of Social Science Research; Auckland Evaluation Group; Australasian Evaluation Society; Maori Evaluation Association; SPE@R; Waikato Evaluation Group; Wellington Evaluation Group.

- more regular national professional development opportunities, including an annual national evaluation conference, and regular training opportunities, and
- provision of professional support services.

Although there were (and still are) many evaluators who had long standing relationships with the Australasian Evaluation Society (AES), and valued these relationships, there was a broad acknowledgement that the AES was not able to serve the unique needs and context of New Zealand's evaluation community – particularly in relation to indigenous evaluation theory and practice.

In New Zealand, there is a “flourishing of a proactive Maori political discourse”² that has flowed over into evaluation theory and practice. Kaupapa Maori evaluation theory and practice challenges and interrogates the political context of unequal power relations in New Zealand society, and similarly in the structures and relations that exist for evaluation. Continuing to look toward an Australian-based organization for our professional support and development no longer seemed tenable for New Zealand evaluators.

Distinctive to **anzea** is our commitment to the Treaty of Waitangi, to our matakite³ (vision), and to the whakatauki (proverb) ‘*He kura te tangata*’ (People are precious). The whakatauki reflects the regard that we have for the intrinsic value of a human being and for the contribution of each person to the well-being of their whānau / families, their communities and their environment.

Embracing these principles and values as an integral part of the association, establishes our uniqueness in ensuring the inclusion, participation and leadership of indigenous perspectives and world-views in evaluation in Aotearoa / New Zealand.

Strategy and implementation

Strengthening the evaluation enabling environment

The New Zealand public sector is often considered to be one of the ‘early adopters’ of results-based accountability structures and sys-

2 Bishop and Glynn, cited in Pihama, Cram & Walker, 2002, Creating Methodological Space, A Literature Review of Kaupapa Māori Research, *Canadian Journal of Native Education*, 26:1, 30 – 43).

3 *We “look to the maunga”, we strive for excellence. We recognise and value the cultures of all of our peoples. We honour their participation and we seek genuine partnerships. Sharing exceptional skills and insightful knowledge, we seek to support their aims and aspirations for a healthy, prosperous and vibrant future.*

tems. New Zealand's public sector reforms beginning in the 1980s and continued through the 1990s are regarded as having enhanced public sector responsiveness and accountability, focusing public sector managers' attention on their performance.

Over the past 20 years there have been a number of initiatives aimed to achieve a greater focus on outcomes within the New Zealand public sector including:

- Chief Executive Forum – launched in 1993 as a platform to promote the idea of a strategic, longer-term outcome perspective
- Strategic Result Areas (SRAs) – a coordinating device launched in the early 1990s (and existing until the late 1990s) which aimed to foster coherence in policy, planning and operational activities by defining medium-term, government-wide priorities at Cabinet level
- Key Result Areas (KRAs) – set at departmental level and, as such, belonging to the prerogative of the chief executives
- Managing for Outcomes – where the focus of accountability was moved to the outcomes that the agency was intended to achieve, with the results of particular programmes being assessed against the wider outcome that was to be achieved, and
- More comprehensive sector reporting – beginning with the environmental sector in 1997 (Better Public Services, SSC, Treasury, Department of Prime Minister and Cabinet, New Zealand, 2011, p8).

In spite of many years of results or outcomes-based reforms, the wider enabling system for evaluation has not been all that strong or committed, as the more recent formation of a national evaluation association illustrates. One exception is in education, where evaluation has been well institutionalized. At compulsory and tertiary levels there are now agencies with evaluative oversight of educational quality and improvement. However, in the main, the collection of information on performance has largely been driven by accountability requirements, and there has been little demand for evaluative information for management decision-making or improvement. A recent survey of 1,700 managers across a range of government agencies found that more than a third of managers (38%) didn't have information that gave them a good picture of how they were doing and almost half (47%) didn't have information that helped them to understand how to improve their performance or

the impact of their work on the public (56%) (Gill, D (ed.) *The Iron Cage Recreated: The Performance Management of State Organisations in New Zealand*, 2011.)

A step recently taken by the new national evaluation association, **anzea**, towards strengthening the enabling environment for evaluation in New Zealand has been the recent development of a set of evaluation competencies for Aotearoa / New Zealand. The approach taken by **anzea** has been to ensure the competencies have the broadest application, i.e., enhancing the knowledge and demand for quality evidence by funders and commissioners of evaluation, as well as building the quality of the supply of evaluators to provide evidence.

Specifically, the framework of competencies was developed to:

- inform and guide sound and ethical evaluation practice in Aotearoa New Zealand, in a range of roles relevant to evaluation practice
- support the growth and maintenance of culturally competent evaluators and evaluations
- assist evaluators or evaluation teams to identify those competencies that are important in any given evaluation situation
- provide guidance to trainers, teachers of evaluation and tertiary institutions about the minimum or graduating standards for evaluators in Aotearoa New Zealand
- provide a basis for voluntary self-review by evaluation practitioners and organisations, and checklist to assist with professional development
- support the development of employment criteria or standards for various evaluation positions or roles
- provide commissioners of evaluation with an understanding and expectations of evaluator or evaluation team competencies, and a potential tool which could be used to inform their judgments about the best fit of the evaluators or evaluation teams during the evaluation commissioning process
- increase public awareness and understanding about the dimensions that make up 'good' evaluation practice in Aotearoa New Zealand.

One of the distinguishing features of **anzea** is its commitment to cultural competency in evaluation. The competency framework was

developed with cultural competency embedded within it. Distinctive to **anzea** is our commitment to the Treaty of Waitangi, to our *matakite*⁴, and to the *whakatauki* '*He kura te tangata*'. Embracing these principles and values as an integral part of the framework, and within this project (its process and outcome) is of vital importance, as it establishes our uniqueness as well as our leadership in ensuring the inclusion and participation of indigenous perspectives and worldviews in the development of evaluation standards, competencies and practices, and the integration of these perspectives into the profession.

Clearly identified by evaluators in the early years of the association's development, was a desire for a national association that could advocate and influence evaluation policy and practice in government within the wider enabling environment as well as at individual and institutional levels. This remains a strategic priority of the association, although there is still work to be done to unpack how advocacy might be interpreted in the New Zealand context – in particular how it fits into the broader **anzea** goals, i.e., what might be advocated, and what the means and resources involved in advocacy might entail.

Developing and strengthening a sustainable strategy to enhance individual capacities to conduct credible and useful evaluations

The main focus of **anzea's** strategy for building individual evaluation capacities has been holding an annual conference and to support training and the development of local communities of practice within its regional branches. The annual conference has a commitment to being accessible to a wide cross section of NZ society; i.e., evaluators, evaluation commissioners, evaluation users, community leaders and organisations, students etc. A key part of **anzea** conferences are annual Māori and Pacific caucus meetings that are held just prior to the conference. These caucus meetings are an expression of the importance New Zealand evaluators place on their responsibilities to the Treaty of Waitangi and the role of indigenous cultures to leading, contributing and participating in the development of New Zealand's systemic evaluation capacity.

4 *We “look to the maunga”, we strive for excellence. We recognise and value the cultures of all of our peoples. We honour their participation and we seek genuine partnerships. Sharing exceptional skills and insightful knowledge, we seek to support their aims and aspirations for a healthy, prosperous and vibrant future.*

Strengthening equity-focused and gender-sensitive evaluation systems and evaluations

As the recent UNICEF publication on equity focused evaluation notes, “equity-focused evaluation processes should be used to empower worst-off groups to the maximum extent possible, as well as to ensure that evaluation questions are relevant to the situation of these groups”⁵ Strengthening the equity focus of evaluation in New Zealand is very much grounded in the historical context of colonization. As mentioned above, in New Zealand there exists a Treaty (The Treaty of Waitangi) that was signed in 1840 between the British colonial leaders and Māori tribes. It promised partnership, the right to self-determination and equity in regard to all aspects of citizenship. However, these promises were not forthcoming. More than 150 years of colonization of the Māori culture, language, structures, systems and land has impacted negatively on the equity and wellbeing of Māori people. More recently, successive governments have accepted that there is a need to resolve historical Māori grievances in accordance with the terms of the Treaty and have begun to recognize the need for redress and restitution to, at least in part, enable Māori tribes to strengthen their people, structures, systems, culture and autonomy.

Anzea acknowledges the Treaty, as the founding constitutional document of New Zealand in its constitution. Some of the ways in which the association has sought to give effect to the principles of the Treaty (partnership, participation, and protection) have been as follows:

- The inclusion and representation of Māori on the anzea board is a constitutional requirement
- The leadership of key projects (such as the evaluation competency development project) sponsored by the association have had joint leadership responsibility between Māori and non-Māori members and board members
- Support for the development of indigenous evaluation methodologies and resources is a strategic priority for anzea, and one effort that can be easily accessed is the recent digest of indigenous New Zealand evaluation resources published by the association (http://www.anzea.org.nz/index.php?option=com_content&view=article&id=107&Itemid=115)

5 Bamberger, M & Segone M (2011), How to Design and Manage Equity Focused Evaluations, UNICEF.

- Scholarships are offered at every conference for indigenous delegates to attend
- anzea Conferences are preceded by a Māori / indigenous meeting (hui), that is lead and attended by Māori and other indigenous colleagues
- Māori practices (tikanga) are embedded into the way anzea conducts its business, for example, all anzea meetings and anzea conferences are opened and closed using Māori protocols and language.

Bottlenecks and challenges

One of the major challenges for the association has been ensuring our financial sustainability. The organization has three main streams of potential funding, member subscriptions, conference surpluses, and any other surpluses generated from workshops of other training events. The initial subscription was kept very low. The association has a strong equity focus, and wanted to ensure the association was accessible to as many as possible. More recently, membership fees have increased, and a strategy for attracting corporate membership has been developed. However, the income stream from membership subscriptions is still not sufficient to keep the association afloat. **anzea's** viability depends heavily on the surplus from its annual conference. At regional levels, events are run as much as possible on a cost neutral basis, so as to ensure accessibility by as many in the evaluation community as possible.

Another major challenge is that the association is mostly a voluntary organization, with only one part time paid position. **anzea** therefore relies heavily on the goodwill of many members who juggle the demands of full time employment, families etc., with their support for the implementation of **anzea's** strategy.

Key enabling factors

As the Māori proverb reminds us, *He aha te mea nui o te ao? He tangata! He tangata! He tangata!* What is the most important thing in the world? It is people! It is people! It is people!

The three things that have enabled anzea to make the progress it has made have been:

- people's commitment to the vision and purpose of the association

- people's unwavering support of the board, and the long term anzea strategy
- people's willingness to donate their time and effort to getting the work done.

Innovations and lessons learnt

Nothing is possible without the assent, buy-in, cooperation, enthusiasm and effort of lots of good people. When good people come together, and are able to collectively harness their motivation, drive, energy and skills, good things happen. Sustaining the momentum of giving and serving our profession will always require us to pay careful attention to the needs of the people we have developed our association for.

Next steps

Anzea's plans for the future fall into three main categories:

1. Continuing development and strengthening of organisational capacity and infrastructure. A key part of this work will be to ensure our sustainability as a viable and vibrant organisation, able to support the needs of the Aotearoa New Zealand evaluation community, those affected by evaluation, as well as the broader enabling environment for evaluation.
2. Development and refinement of our member services. In particular anzea will focus our efforts on strengthening individual and organisational capacities to commission, do and use evaluation. This work will build on the work of the competency project, ensuring that we target the specific professional development needs identified by our member evaluators, as well as the needs of those institutional members to be able to develop and implement sound, effective evaluation policies and systems.
3. Support for the strengthening of the broader enabling environment for evaluation. In particular, this will involve a strategy of anzea promoting and creating opportunities for dialogue about evaluation, evaluation culture and thinking among institutional champions and leaders across New Zealand.

NIGER: RÉSEAU NIGÉRIEN DE SUIVI EVALUATION (ReNSE)

ReNSE'S CONTRIBUTION TO THE PROMOTION OF GOOD GOVERNMENT IN NIGER WITHIN A DEMOCRATIC AND DECENTRALIZING CONTEXT

Boureima Gado

ReNSE Coordinator

Background

History: ReNSE was created in August 1999 and formalized in August 2010. A founding member of AfrEA, whose 4th Conference it organized in Niamey in 2007, ReNSE takes part in all of the consultations of the VOPEs interested in the setting up of a French-speaking Evaluation Network (*RFE – Réseau Francophone de l'Evaluation*).

What made the strength of ReNSE was the fact that it was possible to wisely articulate the efforts of the various stakeholders, thereby constantly creating synergies between the actors, be they government officials, financial and technical partners or from civil society. Some of the first coordinators of ReNSE were from UNICEF and UNPD, and some were nationals who eventually took over while making sure that the measures provided by the statutes that guaranteed this intermingling be scrupulously respected.

The driving forces of ReNSE stem from the existence of a critical mass of members from all kinds of horizons (e.g. civil servants, civil society players, etc.) who master the tools of monitoring and evaluation, which they can share, and from ReNSE's ability to organize events relative to monitoring and evaluation both at national and international levels.

The main key actors and partners of ReNSE are the Administration – the Ministry of Planning, the National Institute of Statistics (*INS, ISEP*) – the United Nations (UNICEF, UNPD), the World Bank,

the African Development Bank (AfDB), bilateral cooperation (Switzerland, France, Canada, Germany), organizations from national and international civil societies (AfrEA, IRD¹, SNV², etc.) and many actors involved in development projects. Partnerships with the University of Niamey and the National School of Administration and Magistracy (*Ecole Nationale de l'Administration et de la Magistrature*) are currently being discussed.

Having opted for the establishment of a formal structure since its General Meeting (GM) in 2009, ReNSE held its statutory GM on 14 April 2012. A new Coordination Committee of eight (8) members was elected for a mandate of two years. The committee is comprised of six men and two women.

Strategy and implementation

The increasing interest in the monitoring and evaluation of policies and development programs and in results based management led Niger, among other countries from the sub-region, to participate in 2006 in a diagnostic study of national evaluation capacity. The role of ReNSE in promoting a culture of evaluation was acknowledged. The results of the study showed that evaluation in Niger is mainly considered to be a statutory obligation partly driven by the technical and financial partners involved. The study revealed the increasing importance given to the development of evaluation in Niger and highlighted that the decentralization of evaluation practices, the reinforced anchoring of evaluation functions in institutions, the development of training and the professionalization of evaluation were the main strategies to be considered for the development of evaluation capacity of Niger. This diagnostic of evaluation capacity led to a keen interest in and a political will to promote a culture of evaluation.

In addition to the routine activities for promoting evaluation in which it took part with other actors during the past three years, ReNSE organized important events aimed at contributing to the development of evaluation in Niger:

- **June 2010:** Workshop on good practices in monitoring and evaluation in Niger. Assessment of ReNSE's contribution.

1 Institut de Recherche pour le Développement

2 Netherlands Development Organisation

- **December 2011:** Reflection Days on the contribution of civil society to the development of the evaluation culture in Niger.
- **June 2012:** (High-level) training in the evaluation of development policies and programs, given by a professor from the University of Ottawa.
- **July 2012:** The first Nigerian Days of Evaluation, whose central theme was: "The institutionalization of evaluation in Niger for sustainable development".

These events were organized in cooperation with the government Ministry in Charge of Evaluation, UNPD, UNICEF and AfDB. Training and technical institutions (University, *LASDEL*, *INS*) and technical and financial partners made presentations. International experts, notably from partner national evaluation societies and associations, also lent their support.

It is within this context that ReNSE is currently elaborating a strategic plan and envisages to begin this very year with UNICEF a training program designed for actors and civil servants of the local authorities to learn the use of evaluation tools, with a special emphasis being put on evaluations and evaluation systems focused on equity and gender, e.g. through the promotion of issues regarding cultural sensitivity, equity, social justice, empowerment, transformation and equality between the sexes, supported by the evaluation community.

On an institutional level, ReNSE is planning, as stated in its annual action plan, to make efforts to approach not only its traditional partners, but also new ones that have become interested in ReNSE's activities thanks to its dynamic lobbying.

Constraints

- A few reservations on the part of certain managers who did not grasp very well the stakes of evaluation. However, thanks to the training courses, the awareness building and the availability of the government administration, this kind of reticence is steadily fading, and now we even see institutional representatives, such as members of Parliament or of the Court of Auditors, gradually take an interest in evaluation issues.
- The establishment of all the statutory bodies took longer than anticipated, slightly slowing down ReNSE's activities. However, coordination is being deployed to make the Scientific

Committee, the Thematic Groups, the Enlarged Meeting, the Partner Consultation Framework, the Regional Focal Points and the Permanent Secretariat operational.

- ReNSE's limited amount of material (equipment) and financial means constitutes a handicap for it. Despite internal resources (i.e. membership fees and the regular payment of dues), the few initiatives and activities that ReNSE, as a non-profit association, is allowed to have do not enable it to meet the expenses of its projects aimed at gaining good national coverage in terms of evaluation.

Progress and outcomes

ReNSE has achieved many results since 1999. It would be fastidious to enumerate them all here, but to mention just a few:

- ReNSE's dynamism, demonstrated by its capacity to mobilize for participation in evaluation activities, has given it a certain aura of fame, both at an African and at an international level;
- ReNSE's undeniable contribution to the development of an evaluation culture in Niger and Africa;
- Its contribution to the development of evaluation in the state structures and within civil society;
- The constant deployment of efforts to direct thinking and exchanging towards evaluation, with the view of multiplying and consolidating leadership.

Essential Factors

Active members of ReNSE pursue the promotion of evaluation in the structures where they exercise their technical functions and call upon other ReNSE members competent in evaluation for capacity building.

The voluntary engagement of the government structure in charge of evaluation has contributed to make ReNSE a credible and unavoidable partner within the administration and to spark interest in evaluation by most of the stakeholders.

The training activities in monitoring and evaluation and the promotion of an evaluation culture have led administration officials to introduce aspects relative to monitoring and evaluation in the legislation and regulations.

Innovations and lessons learnt

- Training and capacity building aimed at better articulating the norms and standards of AfrEA with those of the technical and financial partners;
- A good division of labor, not only among members of the Coordination Committee, but also with the other members of ReNSE;
- Efficient communication via the internet (e.g. website, newsletter, etc.);
- Consolidating good partnerships with the actors of development both at national and international levels;
- Demand in evaluation capacity building increases as dissemination continues.

Next steps

- The elaboration of ReNSE's strategic plan;
- Ownership of the AfrEA norms and their effective use to evaluate public policies and all development actions. An initiative is being formulated in this direction;
- The GM of April, 2012, and the National Evaluation Days during July, 2012, placed a great emphasis on training with a view to certification, in cooperation with the training structures and with a view towards mentoring;
- The stimulation of partnerships with: the government actors, the technical and financial partners, the non-government actors and the evaluation associations/societies (VOPEs);
- Communication with the institutions of the Republic (e.g. Parliament, Court of Auditors, Economic and Social Council) and awareness building within them;
- Contributing to citizen (civil society) control for the use of evaluation tools;
- The deployment of ReNSE within the country;
- The establishment of all the statutory bodies;
- The appropriation of tools for evaluating impact and equity.

ROMANIA: ROMANIAN EVALUATION ASSOCIATION (EvalRom)

EvalRom. CHALLENGES FOR CONTINUITY

Roxana Mihalache
Chairperson, EvalRom

Background

EvalRom was founded in 2008, after two years of functioning as an informal network under the same name. The first meeting of the informal network took place in august 2006 and was facilitated by Ross Conner, chairperson of IOCE at that time. EvalRom was formally founded by 19 individual members, most of them coming from the supply side of the Romanian evaluation market. All the activities of the association are based on the volunteer contribution of the members; there is no paid staff. The association benefited from the institutional support of several institutions and companies, such as private companies (Pluriconsult Ltd., GEA Strategy and Consulting S.A., Deloitte Romania, Safege Engineering Consulting, Rentrop&Straton), NGOs (Romanian-American Foundation, The Assistance Centre for NGOs, National Foundation of Young Managers, Civil Society Development Foundation), two major universities in Romania and the Evaluation Central Unit from the Romanian Ministry of European Affairs. The active membership of the association is fluctuating. Currently, the association has 45 members of which seven board members actively participating in the association's actions.

Strategy and implementation

Strengthening an enabling environment

In 2010 EvalRom implemented a project funded from an EU grant scheme (called "Transition Facility") focused on promoting transparency and public accountability in Romania. The project included two workshops (one for increasing the capacity of NGOs to use evaluation and one for media to use evaluation reports in their work), a conference at the Parliament for promoting evaluation as

an instrument of public accountability, and a study on the evaluability of the public policies in Romania.

Since its foundation, EvalRom actively participated in activities related to the development of national evaluation culture. For example, in 2008 we organised, together with the above mentioned Evaluation Central Unit, two so-called “regional workshops” in two regions remote from the capital city. The workshops aimed to promoting EvalRom and to raise participants’ awareness on evaluation. EvalRom organised a plenary session dedicated to evaluation and neighbouring disciplines as part of the National Evaluation Conference organised by the Evaluation Central Unit in 2009.

EvalRom is providing ad hoc advice in evaluation to the central authorities. In 2009 EvalRom was asked by the Prime Minister’s advisor on public administration to undertake an ad hoc study on the national evaluation system. Also, EvalRom representatives actively participated in events organised by the Evaluation Central Unit discussing the Action Programme for the Development of the National Evaluation Capacity (roundtable in 2008) and the evaluation culture in the system of Structural Instruments in Romania (roundtable in 2012).

EvalRom’s experience on networking in evaluation was shared and disseminated in international environments such as: UNDP regional workshops addressing evaluation (Istanbul 2006, Bucharest 2007), EES Biennial Conferences (Lisbon 2008, Prague 2010), Slovak Society for Evaluation (Bratislava, 2010).

Developing/strengthening a sustainable strategy to enhance individual capacities to conduct credible and useful evaluations

The demand for program and policy evaluations in Romania is still at a modest level. Most of the existing demand is related to the implementation of Structural Instruments which is limiting competition and practitioners’ opportunities to engage in a diversity of evaluative practices. The only notable demand for “domestic” evaluations, a real alternative to the evaluation in the system of Structural Instruments, is generated by the quality assurance system in pre-university and high education. Given this context, EvalRom adjusted its intervention strategy to the national context and realities. That is why since our foundation, apart from the above mentioned workshops addressing NGOs staff and media, we organised two professional development workshops and two roundtables dedicated to

our members and opened to other professionals potentially interested. Thus, in 2009 we organised a professional development workshop on evaluation use and usability held by Murray Saunders, president of the EES at that time. The workshop, hosted by the Department of Sociology of the University of Bucharest, was attended by 24 people.

In 2011 EvalRom addressed the needs of the members in terms of their interest for the development of the national capacity in evaluation and counterfactual impact evaluation (an average of 10 participants per roundtable). Each topic was discussed in a dedicated roundtable, organised more like open discussions around the respective topics. In 2012 we organised two professional development workshops dedicated to evaluation in education. The workshops were led by four of our members (three of them university teachers) who delivered presentations and facilitated discussion among participants (an average of 30 participants, students and teachers of the Department of Psychology and Education in one workshop, while the other workshop was attended by EvalRom members and teachers in the national pre-university education system). The workshops were organised one in partnership with the oldest higher education institution in the country (University “Al. I. Cuza”, located in the Eastern region of the country, in Iasi) and the other with the support of the National Agency for Quality Assurance in Pre-university Education System.

Apart from the professional development workshops, EvalRom has an online resource centre hosted by our website (www.evalrom.ro) addressing the needs for documentation in evaluation of our members and of the general public. This is a resource for guidelines, manuals, publications in evaluation, as well as a resource for easy finding Romanian evaluation reports.

The limited organizational capacity in addressing members' needs for professional development, as well as in advocating more effectively for evaluation use, requires more efforts allocated for raising funds (mainly, writing proposals) in order to increase the resources available for reaching our objectives.

Strengthening equity-focused and gender-sensitive evaluation systems and evaluations

EvalRom's draft Code of Ethics includes references to equity and social justice, but the interest to formally adopt the Code by the Members' General Assembly is still low. Currently, practical and

methodological issues are higher on members' agenda than the ethical aspects.

How our VOPE strengthened its own institutional capacity to be able to deliver on the three issues identified above

In order to compensate the lack of institutional capacity, EvalRom is engaged strategically in partnerships with organizations having an interest either in developing evaluation culture in Romania and/or in strengthening the capacity of associations in the domain of evaluation. In fact, all EvalRom's achievements are due to our diverse partnerships.

Bottlenecks and challenges

The immaturity of the national evaluation market (modest size and no diversity) with the lack of local and national demand for evaluation is a major challenge for our association.

EvalRom has very limited financial resources and a limited resource mobilization capacity, its' activities are based entirely on the volunteer support of the members and sponsors (in a very broad sense). Related to the above weakness, the association lacks proper office space and logistics, depending almost entirely from local sponsors – not many, taking into account the specificity of the evaluation market.

The local cultural context, dominated by low trust and blame culture at all levels and in all domains, is a bottleneck for engaging in dialogue (even less on topics related to borderline/interdisciplinary/neighbouring domains or disciplines). Connected to that, there is a limited awareness of the benefits of professional networking in evaluation in Romania among practitioners, researchers and university teachers.

Progress and results

EvalRom's progress is measured against the association's objectives as they are stated in the Statutes. Although stated in general terms and not formulated in SMART format, still they allow for monitoring progress as presented as follows:

Objective (current status)

- Indicator

1. To promote the use of evaluation in the public, private and NGO sectors (in progress):
 - over 500 people informed about evaluation (visitors of EvalRom's website, participants in conferences and workshops – those dedicated to the professional development in evaluation not included here)
2. Based on the use of evaluation, to contribute to the increasing transparency and accountability in the public administration (in progress):
 - one project addressing the use of evaluation for increasing transparency and accountability in the public administration
3. To contribute to the development of the national evaluation capacity (in progress):
 - two studies on national evaluation capacity (national evaluation system and evaluability of public policies)
 - Active participation in 2 events on the development of national evaluation capacity
4. To promote quality in evaluation (no progress):
 - Professional standards adopted
5. To promote quality in the professional development in evaluation (in progress):
 - 100 participants attending professional developments and roundtables
6. To contribute to the international knowledge base in evaluation (no progress):
 - Contributions to international events and/or publications in evaluation (including this case study with EvalPartners)

Key enabling factors

- The main trigger for EvalRom's achievements was the country's EU accession. This was instrumental in the establishment of a basic evaluation culture in Romania due to the perspective of an increasing evaluation demand as part of the Structural Instruments System. A nucleus of a professional evaluation community has emerged. Immediately after accession (in 2007) the entity responsible for coordination of the development of evaluation

capacity in the Structural Instruments System (the Evaluation Central Unit) promoted the growth of professional evaluation networks by helping to ensure that professional network membership is a preferred characteristic for evaluators within administration, as well as for independent external evaluators hired by the administration. Also, the Government in power at that time was in favour of introducing evaluation of public policies (public policy units were established in all Ministries, secondary legislation was issued to enforce evaluation activities). Beginning with 2009 the efforts of establishing a national evaluation capacity stagnated; the only sustainable progress was in the Structural Instruments System.

- Networking with other Romanian NGOs, as well as with other international evaluation associations (especially in Europe) strengthened our visibility and our capacity to gather new members, although the membership is still fluctuating.
- The process of establishment our association was quite long (more than two years) and constantly promoted on a web platform reflecting our meetings and actions in a transparent manner. The founding members took the time for debating on the future mission and activities of EvalRom and actively engaged in documenting their positions. This has strengthened our credibility and legitimacy among potential members and stakeholders.

Innovations and lessons learned

We are aware of the fact that each evaluation association is emerging in a specific context, with specific challenges and opportunities. For those who are interested, we are willing to share our experience concerning how to set up a functional evaluation network in a developing evaluation culture. Thus, drivers such as the existence of a core group dedicated to the group of initiative, with good connections among stakeholders (NGOs and professional associations, academic sector, business sector and public sector) and with a constant, long-lasting interest in the development of an emerging association acting in a transparent and flexible manner might be a solid foundation. Starting with an informal network, opened to many professionals and ideas, giving time and space for the ideas to reach maturity and a critical mass of supporters, as well as using every opportunity to promote your initiative(s) might increase interest and trust of potential members. After launching the network addressing promptly to the interests of the members would build and consolidate credibil-

ity of your network.

Next steps

Strategically, EvalRom is oriented towards ensuring a flexible framework of dialogue among a variety of professionals interested in evaluation in Romania and to encourage connections with evaluation communities abroad. In practice, we plan to organise a series of events encouraging the dialogue between evaluation practitioners with different professional backgrounds in order to promote the transdisciplinarity of evaluation. Also, in line with our statutes, we intend to strengthen the executive management of our organisation by drafting a manual of internal procedures to be discussed and adopted by Members' General Assembly.

SENEGAL: SENEGALESE EVALUATION ASSOCIATION (SenEval)

SenEval – A DECADE OF ADVOCACY AND ACTION FOR EVALUATION IN SENEGAL

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and programmes, National Commission for Population Human
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Ian Hopwood

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M&E Officer at the Regional Office of the UN Capital Development Fund

Guennolet Boumas Ngabina

M&E Officer at Heifer International Senegal

Ndeye Fatou Diop Samb

*Project management consultant, specialising in M&E
and women's entrepreneurship*

Moctar Sow

*President of the Association Sénégalaise
d'Evaluation (SenEval)*

Background

The recently created Senegalese Evaluation Association (*SénEval*) has grown out of the Senegal Evaluation Network, which was established as a result of a seminar held on October 9th 2003 sponsored by

UNDP, UNFPA, UNICEF and the UN Institute for Development Planning (IDEP). The seminar participants, who included representatives from nine UN country and regional offices, laid the groundwork for the creation of the network as vehicle for the implementation of the recommendations that they had formulated. Amongst those recommendations was the need for a network to promote the culture of evaluation in Senegal and more broadly in the West Africa region. The General Directorate of Planning (specifically the Department of National Planning of the Government of Senegal) played an important role in the coordination of SenEval during the period 2003-2006.

Since then, SenEval has worked mainly on the exchange of information and periodic working sessions for members, including other key actors when possible. The number of persons on SenEval's mailing list has grown steadily to the current number of more than 350, with a "hard core" of at least 15 members. The members are from diverse origins, including ministries and other governmental structures, universities and other training and research institutions, think tanks and consulting companies, UN agencies, donors and NGOs, as well as individual practitioners.

Since its creation, the main driving forces and result areas for SenEval have been the following:

- Development of evaluation capacities, starting with its own members;
- Advocacy for the promotion of a culture of evaluation at the national level;
- Development of the institutionalization of evaluation by the State.

This is well expressed in the original charter of SenEval as follows: "The general mission of the Senegalese Evaluation Network is to promote the culture of evaluation. To achieve that objective, the network wishes to undertake several activities linked to the various dimensions of reinforcement of capacities: sensitize the main categories of actors, stimulate their critical reflection, work for the institutionalization of evaluation, support the training of the key actors identified (including its own members) and bring methodological support and the exchange of practice in the field of monitoring and evaluation."

Strategy and implementation

Promote an enabling environment for evaluation: an external environment favourable to evaluation

The principal activities of SenEval that have contributed to the promotion of an enabling environment for evaluation are: a) the diagnostic study of evaluation capacities; b) the Senegalese Evaluation Days (*Journées Sénégalaises d'Evaluation*, JSE) of 2008; and c) the advocacy for the institutionalization of evaluation. These are presented below:

The diagnostic study

A diagnostic study of evaluation capacities entitled “Evaluation as a Democratic Requirement” was conducted in 2006 with the support of the International Organization for the Francophonie and technical back up from Professor Frederic Varone.

The study presents the stated practice of evaluation in Senegal. Through a documentation review, survey and semi-directive interviews, the study shows a “mature” evaluation practice, with more than 90 evaluation cases reported. It also tried to assess the quality of evaluation practice in Senegal through the meta-evaluation of two evaluations using the AfrEA Evaluation Standards. Overall, certain deficiencies were detected in the management of evaluations, and there was a much stronger focus on the control and financial accountability aspects than on the promotion of learning. The diagnostic study further attempted to define a clear institutional framework to promote an evaluation culture on the basis of an analysis of the existing institutional environment, semi-directive interviews with key stakeholders and the elaboration of scenarios for the development of an evaluation capacity development plan. Amongst the main recommendations of the study are the need to: a) organize a high level national workshop on the evaluation of public policies; b) improve the availability of in-country training; c) create or strengthen the planning and M&E functions in line ministries; d) identify an appropriate administrative structure to house the evaluation function; e) promote an evaluation culture, through initiatives such as SenEval; f) elaborate a national evaluation policy/strategy with three objectives: the institutionalization of the evaluation function, the improvement in the quality and scope of evaluation practice, and the promotion of an evaluation culture.

The Senegalese Evaluation Days (JSE)

SenEval members actively supported the organization of the Senegalese Evaluation Days (JSE) held in October 2008 on the theme of “Culture and practice of evaluation in Senegal: What’s at stake for public policy?” The decision to hold the JSE was a direct consequence of the above mentioned diagnostic study. This initiative was organized by a broad-based team, convened by the Delegation for the Reform of the State and Technical Assistance (DREAT), with technical support from Laurent Denis of F3E. The three day event – opened by the Secretary General of the Presidency – attracted more than 200 participants who benefited from the training and guidance provided by national and international experts from the UN system, Canada, France and Switzerland. The first day targeted a smaller high level group specially focused on the evaluation of public policies. Overall, the JSE brought together an impressive group of participants that included Secretary Generals and Permanent Secretaries and Directors of Ministries, parliamentarians and local elected officials, representatives of the National Audit Office, the Government Inspectors, and NGOs and development partners, who collectively reaffirmed the imperative need to reinforce oversight and transparency in the public policy arena, and to strengthen their own capacities in evaluation. It also allowed a wide dissemination of the diagnostic study of evaluative capacities, which had contributed to strengthening the conclusions of the JSE. This model has perhaps encouraged the holding of similar events like those in Benin and Niger.

Advocacy for the institutionalization of evaluation

Since its creation, SenEval has advocated for the institutionalization of evaluation targeting principally the Presidency of the Republic, the Delegation for the Reform of State and Technical Assistance (DREAT), the General Directorate of Planning of the Ministry of Economy and Finances, and the Government Inspection Office (*Inspection Générale d’Etat*). The technical challenges attached to institutionalization and the high stakes have been frequent themes of SenEval meetings.

This long running advocacy coupled with specific advice from certain influential members of SenEval have contributed to the government’s recent decision to establish in the President’s Office a Commission for the Evaluation and Monitoring of Public Policies and Programmes. SenEval aims to get involved in the process of institutionalization initiated by this decision.

Develop and reinforce a durable strategy to improve the individual capacities to conduct credible and useful evaluations

The activities to develop individual capacities to conduct credible and useful evaluations have been aimed principally at SenEval members, including other actors when possible, and can be categorized as follows: a) workshops and seminars; b) information sharing by email and SenEval's virtual platform; c) mentoring and informal support; d) partnership with universities and centers of excellence; e) participation at evaluation conferences and professional networks.

Organization of workshop and seminars

In recent years several important training workshops have been organized, conducted principally by international experts who have generously donated their time:

- Training workshop (six sessions) for 60 participants on the principles and methods of evaluation, taught by J Bradley Cousins (University of Ottawa) and Boubacar Aw (CESAG), organized with CESAG in April 2011;
- Half day workshop in July 2011 organized with IFPRI and the Centre for Research on Political Economy (CREPOL) on the topic "Evaluation Impact- Progress and Challenges". Animated by Dr. Annie Duflo and Loic Watine (Innovations for Poverty Action-IPA);
- Half day workshop in October 2011 on the evaluation of public policies, organized with the International Development Research Centre (IDRC/CRDI). Animated by Fred Carden, IDRC's Director of Evaluation, and Colleen Duggan;
- Two training workshops for about 50 participants in January 2012 with Marie Gervais (University of Laval) on "The rights and responsibilities of the manager faced with evaluation" and "Successfully undertaking a quality evaluation in a context of turbulence";
- Feedback session in April by those who participated in the 2012 AfrEA Conference;
- Training workshop for 45 participants with Jim Rugh, Oumoul Khayri Ba Tall and Mónica Lomeña Gelis on "RealWorld Evaluation" in May 2012, organized with CESAG, and a lunchtime seminar by Jim on Impact Evaluation, organized with IFPRI.

Sharing Information by email and SenEval's virtual platform

The most regular – and well appreciated – service for members is information sharing through a fortnightly e-newsletter to the more than 350 persons on the list, of whom 27% are women. The information includes consultancy and employment opportunities, training courses, webinars, new publications, and the activities of other evaluation networks and associations. Amongst other things this has allowed access to training (sometimes with financial aid) and the wide dissemination of employment and consulting opportunities. Most of the content is focused on Senegal and Francophone West Africa, but selected information on webinars and publications in English is also shared and used.

In addition, a virtual platform – established in 2011 with the University of Ottawa – serves as a document repository and channel for information sharing. About 200 members have access, which is normally given by the SenEval knowledge management focal points upon request. Training materials used at SenEval events since 2011 are available, as well as documents on evaluation practice and also electronic links to other web-based resources. The platform is underexploited, mostly used as a “drop box” for information to be downloaded, in order to avoid sending large documents through the fortnightly mailings. The online discussion function, the calendar, and the skills roster will hopefully be used more productively in the coming months.

Mentoring and informal support

Experienced SenEval members have assisted other members in registration procedures for training opportunities, or in the preparation of presentation proposals for conferences, including AfrEA and the European Evaluation Society. So far, very few members have taken full advantage of these opportunities.

Partnerships with universities and centres of excellence

SenEval collaborates with several universities and centres of excellence. This is facilitated by the presence of members in Cheikh Anta Diop University (UCAD) of Dakar, Gaston Berger University (UGB) of St Louis, the African Centre for Higher Management Studies (CESAG), the National School of Administration (ENA), the National School of Applied Economics (ENEA), the Polytechnic University of the Sahel, and the new National School of Statistics. For the moment, evaluation is taught at post graduate level as part of

existing programmes in the fields of project management, planning, sustainable development, education, etc. At least two institutes – CESAG and UGB– aim to establish a post graduate diploma or master’s degree in evaluation. The advice of SenEval will be sought in this regard.

Among examples of this type of collaboration, there are the visits of Prof Bradley Cousins (University of Ottawa) in 2011, and of Prof Marie Gervais (University of Laval) who comes to Senegal for six months in early 2013 to support evaluation capacity development, primarily through CESAG/CLEAR and SenEval. Amongst others, she will help reinforce SenEval’s networking with professors and researchers in evaluation and related fields.

Since 2009, SenEval members have helped create the conditions that resulted in the selection of CESAG as the CLEAR centre for Francophone Africa. The partnership between SenEval and CESAG/CLEAR should further develop in the coming months, through the co-organization of specific activities.

Participation at the international evaluation conferences and professional networks

The various initiatives to reinforce evaluation capacities in Africa since 1990 include fourteen international conferences (of which six were AfrEA conferences) and many other M&E seminars. Senegalese participation has been uneven, partly due to the language barrier, given that many of the conferences are in English. In most cases, the participants have come from government agencies, research institutions, or the UN.

In this context, SenEval’s efforts to promote participation at the 2012 AfrEA conference are noteworthy. Eight members attended, of which four made panel presentations, one conducted a training workshop, and another coordinated the conference workshops. For perhaps the first time, a feedback session, with presentations, was organized back in Dakar, attended by nearly 50 members.

SenEval members were resource persons at other evaluation events in Benin, Morocco and Niger in the course of 2012. This illustrates the very positive tendency of dialogue and exchange between actors and the evaluation networks that the new CESAG/CLEAR initiative will reinforce.

Several SenEval members have participated in the IPDET development evaluation training at Carleton University, and more recently

the PIFED (Francophone) training at ENAP, Quebec. Some members have attended the course on participatory planning, monitoring and evaluation organized annually in Burkina Faso by the Centre of Development and Innovation of the Wageningen University.

Reinforcement of evaluations and systems of evaluations focused on equity and gender

SenEval aims to address themes which interest members, without priorities fixed in advance, and in the spirit of a holistic approach. Consequently we have not given an explicit priority on evaluation focused on equity and gender. However, several members are interested in equity-focused and gender-responsive evaluation, and relevant trainings and webinars have been announced through the mailings.

Constraints

The three major challenges and limiting factors that have impeded the capacity to implement SenEval's strategy are as follows:

- Maintaining the level of motivation and commitment of members has been difficult because of SenEval's weak organizational capacity. SenEval has relied on the unpaid voluntary work by members, which has therefore to a large extent limited activities to those that could be undertaken with partners who are ready to provide logistic or material support. This prevents us from meeting all member expectations, nor does it allow members to express their full potential and sense of initiative.
- This limited organizational capacity is linked to the lack of funds to ensure the sustained financing of a coherent action plan. SenEval's activities are therefore organized for the most part in a reactive manner, when an opportunity and resources present themselves. A strategic plan is needed, at least partially funded, in order to mobilize the full potential of members, and to meet the expectations of government and other potential partners.
- This informal character as a network has not facilitated the institutional recognition of SenEval by the government, nor the mobilization of support for capacity development. The system of consensual decision taking and lack of clear definition of certain responsibilities have impeded certain advocacy initiatives, and made it difficult to ensure the formal representation of SenEval in certain coordination and decision making fora.

Progress and results

- The growing public recognition of the importance of evaluation and the increasingly strong government commitment, to the point of deciding to establish a Commission for the Evaluation and Monitoring of Public Policies and Programs;
- The growing accessibility of SenEval members to training opportunities, with a positive impact on the capacities in the fabric of evaluative practitioners;
- The reinforcement of SenEval's capacities to organize training events, thanks to the experience acquired by members in the conception and the conduct of the workshops undertaken with international experts;
- The reinforcement of the capacities of members thanks to the sharing of information on scholarships, training courses, documentation, etc.;
- The increasing participation of members in meetings and through their contribution to international debates on evaluation issues;
- The expansion of membership (more than 350 signed up for the mailing list);
- The first steps towards the establishment of operational thematic groups;
- The transition of SenEval from an informal network to a formal Senegal Evaluation Association that was initiated at the well-attended Constituent General Assembly on 13 October 2012, when officers and a committee were elected and the statutes approved.

Key enabling factors

The three key factors that have enabled SenEval to reach the results and progress mentioned above are:

The quality of the members: In particular, one can point to the diversity, continuity, motivation and profile of the members, and the dynamism of the active core group. The diverse membership (coming from government, training and research institutions, think tanks, consulting groups, NGOs, the UN system, donors, etc.) contributes to the richness of exchanges, and enhances SenEval's advocacy capacity. The stability of the active core group has contributed sig-

nificantly to the continuity and credibility of SenEval's work, despite the lack of funding and the informal character mentioned above. The genuine interest of members is a success factor, well-illustrated by the fact that there are at least 30 to 40 participants for every presentation and workshop.

The International networks: The enthusiasm and motivation of the active core group has been sustained by the recognition and encouragement resulting from their involvement in international networks, notably AfrEA, the French Evaluation Society (SFE) and the Francophone Evaluation Network (RFE), and to a lesser extent the African Community of Practice for Managing Developing Results (AfCop MfDR). In that same context, the willingness of eminent international evaluation experts (Cousins, Gervais, Rugh, Ba Tall) to support the capacity strengthening work has greatly reinforced SenEval's visibility and credibility.

The positive dynamic regarding evaluation: The growing interest in evaluation has facilitated the action of SenEval, and at the same time is partly a result of that action. Over the past four years the government has taken decisions to reinforce evaluation, results-based management and the national statistical system. This has improved the positioning of monitoring and evaluation, representing a real – though timid – progress in the promotion of an evaluative culture.

There is still a lack of a coherent national evaluation policy that can provide an organizing framework to ensure the harmonization of initiatives taken, and the identification of remaining gaps.

The interest in the reinforcement of evaluation capacities displayed by partners such as UNDP, UNICEF, IOCE and the support coalition for the CLEAR Initiative has also been a source of encouragement for SenEval, opening up a promising perspective of increased support after the transition from network to Association is completed.

Innovations and lessons learnt

The development of SenEval is a long term process requiring commitment and patience. We do not yet have brilliant ideas to share, but the following ideas are offered.

SenEval's experience reconfirms the critical importance of government action to institutionalize evaluation. The institutionalization should include the adoption of appropriate evaluation standards,

and practical arrangement for capacity development to improve evaluation practice. It is essential to identify actions and strategies to promote the “demand” for evaluation.

Another critical factor is the need to formalize the network – at the right time – and to create an Evaluation Association in order to obtain the means to accompany the government in the institutionalization of evaluation. This process which is already under way in Senegal, notably reflected by the intention to create a Commission for the Evaluation and Monitoring of Public Policies and Programmes.

Next Steps

In the coming months, SenEval expects to focus on: a) reinforcing individual capacities; b) promoting an enabling environment for evaluation, including evaluation focused on equity and gender; and c) reinforcing its own institutional capacity. Below is a set of actions that will be further refined and prioritized and then integrated into an action plan for the period until end 2013.

The immediate challenges are the completion of the process of establishing the Evaluation Association, the re-launching of the thematic groups, the development of a strategic plan and a “manifesto”, the creation of a website, and the updating of the membership database. The database should facilitate an inventory of members’ sectors of activity, for purposes of better management and targeting of training. In this exercise, members will be invited to share their expectations regarding the new association, and to indicate what they can contribute to specific activities or to the general management of the Association.

It is also planned to establish a database of professors and trainers in evaluation, and of independent evaluators, as far as possible in close collaboration with CLEAR-CESAG.

A strategic plan for capacity development could eventually include the following:

- Technical and material support, in synergy with other VOPEs and international partners;
- Formal partnerships with other VOPEs and international organizations both in Africa and internationally;
- Support for scientific works, through the expected collaboration

with EvalPartners and EvalMentors, for example through the production of an annual evaluation publication, and the strengthening of members' capacities to publish in specialized academic journals;

- The second edition of Senegalese Evaluation Days;
- Training workshops on evaluation methodologies with international and national experts;
- Collaboration with institutes of training and research with a view to reinforcing basic training and research related to evaluation;
- Participation in webinars and programmes of on-line training (e-learning);
- Support for the formulation of a code of conduct for evaluators, and for the harmonization of methods and tools.

SenEval is very interested in peer-to-peer partnerships and mentoring opportunities in order to reinforce networking and to improve professional evaluation practice through the development of training and research programmes, as well as professional conferences and the publication of articles in specialized journals. Contacts in that sense have already been made with African VOPEs (Benin, Niger, Ivory Coast, Morocco, Burkina Faso, and Mali), the Quebec Society for Programme Evaluation (SQEP), the French Evaluation Society (SFE) and other partners (Islamic Development Bank, African Development Bank, Swiss Cooperation, UNICEF, CESAG/CLEAR). SenEval has eagerly joined the EvalPartners Initiative and also EvalMentors, and has endorsed the initiative to revive the Francophone evaluation network (RFE).

Much of the above has been achieved thanks to SenEval participation during 2012 in various events, including the conferences of AfrEA, the European Evaluation Society the American Evaluation Association, and the conferences organized in Benin, Morocco and Niger.

SenEval attaches a high priority to the future collaboration with CESAG/CLEAR, which is charged with the strengthening of monitoring, evaluation, and performance management in Francophone Africa. This partnership could include participation in studies such as the survey of demand for evaluation services, the identification of experts to reinforce the data base, and participation in training and the sharing of good practices.

Finally, it is planned to organize a Francophone Evaluation Forum in Dakar that will help revitalize the Francophone Evaluation Network and reinforce capacities, especially of the Francophone VOPEs. This event could reinforce the leadership role of SenEval and further reinforce the collaboration with CESAG/CLEAR.

SOUTH AFRICA: SOUTH AFRICAN MONITORING AND EVALUATION ASSOCIATION (SAMEA)

VOLUNTARISM, CONSOLIDATION, COLLABORATION AND GROWTH. THE CASE OF SAMEA

Ray Basson
Legacy Chair

Background

Phases and growth

The evolution of SAMEA as a national association has several phases: a lengthy incubation phase, formalization as national association, consolidation positioning it for demand and growth. These are driving forces in founding SAMEA, in its evolutionary development and consolidation anticipating growth going forward.

Phase 1 covers roughly the late seventies through eighties till 1994. In this time, interest in and demand for evaluation in South Africa was, in the main, donor-driven through multiple non-governmental organizations, sometimes linked to universities and to the church, driving an agenda for change in opposition to the policies of the Nationalist Party and its exclusionary apartheid structures. Key in those times was: the movement of a cadre of senior ANC leadership and members into exile; mass protest including by women, university students (noted by Sir Robert Birley as being exemplary internationally), clerics and churches; organized visits to the country by individual icons providing a beacon of hope for mass opposition to government policy such as by US Senator Robert Kennedy; a groundswell of mass action by school students against apartheid such as in Soweto. These events sketch the context and background of the incubatory phase leading to the founding of SAMEA.

Against this background, donor funding of non-governmental agencies and their programs has been estimated in billions of rands annually, donors seeing evaluation as a tool to gauge the effectiveness of the programs they fund to help establish if these effectively

assisted targeted groups, the disadvantaged and poor particularly. Whilst demand for evaluation was driven by donors and supply mechanisms were not as yet in place in the country, evaluators were contracted from outside its borders to monitor and evaluate programs here. At the same time, in the early eighties embryonic courses in evaluation found their way into university curricula leading to post-graduate diplomas and degrees, and independent consultancies offered training in evaluation usually leading to certificates of attendance.

At this time, educators from across the spectrum around the country focused minds on the question of quality and how to assess it; these debates being specifically, but not exclusively, on assessment in education. Assessment and evaluation, in this phase, was the specific focus of debate. This loose corpus of individuals from local schools, examining entities, universities, and professional associations, in addition to individuals from international institutions and examining boards, ran a conference in 1994, to debate international trends in assessment and interrogate the newly released ANC document on assessment and evaluation for South Africa under its first democratically elected government lead by President Nelson Mandela. The conference coalesced these energies into an association (ASEESA) which continues debate on assessment. Omitted for the most part was debate on evaluation, which set the stage for the next phase in the development of a national association.

Phase 2 in the evolution of SAMEA covers roughly the first decade of democratic government in South Africa, 1994 to 2007. This phase sees the incremental rise of formal courses in evaluation, interest in evaluation theory and practice internationally, particularly in the USA, attendance at evaluation conferences in Europe, North America, Australasia, and particularly at conferences where the internationalization of evaluation was the theme (joint AEA and CES). This interest in effect brought 'evaluation' back into the debate, as well as its link to 'monitoring'. In the new millennium, practitioners and academics interested in evaluation (program evaluation specifically rather than assessment) shared knowledge about evaluation to prevent re-inventing the wheel. A trigger in formalizing evaluation practitioners into a national association was Michael Quinn Patton's visit to the country in 2002 as key note speaker at a national seminar on evaluation in Pretoria. Prior to his visit, and not unlike the evolution of AEA, informal networks of practicing evaluators had joined together in what was called the South African Evaluation Network (SANet). Patton's visit strengthened the movement

to the extent that by the end of 2003 it had developed into a vibrant M&E forum with 300-400 members. At members' request, a Task Team was appointed with the view to establishing a more formal, national association. In consultation with the SA community of evaluators and interested parties, this initiative resulted in the launch of SAMEA in November 2005. In 2007 the national association had 300-400 members, encouraged the formation of regional chapters, and organized its first national M&E conference.

Phase 3 is one of consolidation of SAMEA as a national evaluation association for anticipated future growth resulting from increased demand for monitoring and evaluation by government particularly, dating from about 2007 to the present. With three bi-annual conferences behind it, founding documents guiding its formation and activities, a dedicated website and listserve to keep in touch with members and extend evaluation more widely in the country, SAMEA now grapples with consolidating the association to better serve its membership and M&E more widely in the country and beyond. Perhaps the critical debate grappled with, and well known in the evolution of M&E associations internationally, is the tension between inspired 'volunteer' 'champions' driving the association, and, the need of hard cash driving the association. Without a 'champion' there is likely to be a paucity of ideas in it as a national association, and without hard cash to implement, ideas may remain on paper only. Both are needed. And similar to the international experience, SAMEA champions are primary, but the association often lacks the funds, time and facilities to give ideas practical effect as demanded of a national association. With hard cash often insufficient, many needed activities to build the association as planned have not always materialised (SAMEA Strategic Plan 2007-10).

Founders and protocols

Key founders of SAMEA include, amongst others Jennifer Bisgard, Zenda Ofir, Kevin Kelly, Fanie Cloete, and Mark Abrahams. Its Board is composed of 10 members elected using a purpose-developed, tried and tested electronic system providing an opportunity for individual members throughout the country to self-nominate or be nominated to stand for election to the Board. Nominees provide a photo of themselves, a CV and a Statement of Intent in which they commit themselves to serve the membership during their tenure by committing to actions they anticipate making to SAMEA during their term of office. An Executive Committee is elected by the Board from amongst its members. A Board member's term of

office extends over three years, at the conclusion of which their term automatically terminates. A Board member may be elected again following a sabbatical period of one year off the Board.

Strategy and implementation

Strengthening an enabling environment

Guided by its strategic goals to advocate for M&E, provide a platform for interaction around M&E issues, promote professional and ethical standards for evaluation and organize annual national capacity building M&E workshops (Abrahams 2007), SAMEA is one of four initiatives having as their aim the strengthening of the enabling environment for evaluation in the country, three having been launched in the past 2 years. Broadly speaking, each has a commitment to creating what Segone (2007) refers to as a country-led strategy for national evaluation capacity development, to strengthen the enabling environment for evaluation.

The most influential initiative, led appropriately by Government, the Department of Performance Monitoring and Evaluation (DPME) was established in 2010. DPME is placing evaluation units or departments in each of the three tiers of government, at the national level located in the Office of the Presidency, at the provincial level located in the Office of the Premier in each of the 9 provinces, as well as in local government offices. In doing so, DPME has provided, amongst others, a national evaluation framework, Evaluation Plan, evaluation standards and competencies, each strengthening an enabling environment for evaluation, which at the same time lays a foundation for strengthening accountability, transparency and managing for results. With its establishment has come a new emphasis namely, strengthening evaluation systemically.

Next in creating an enabling environment for evaluation are two initiatives, both located in universities as host institutions of evaluation: the CLEAR initiative at the University of the Witwatersrand and Crest at the University of Stellenbosch. The former is a World Bank initiated and supported initiative with the aim of evaluation field building in South and Anglophone Africa by working closely with governments on multiple evaluation-related activities, including mapping the field and growing scarce evaluation skills in governments. It offers specialist capacity building courses and scholarships enabling those with limited resources to attend, funds evaluation activities with government relating to evaluation demand, eval-

uation projects such as developing evaluation standards and competencies, tracking university courses in evaluation, and the like. The Crest Centre more specifically focuses on high level specialist courses in evaluation leading to both post-graduate diplomas and to degrees up to and including a PhD. With both initiatives targeting individuals and governments in South African and in countries in sub-Saharan Africa, they strengthen an enabling environment for evaluation here and beyond our borders.

Other players strengthening the enabling environment for M&E in SA include: national state departments, such as the Public Service Commission (OPSC), Public Administration Leadership and Management Academy (PALAMA); national and private foundations, such as the GIZ, Zenex; universities, including the Universities of Cape Town, Pretoria, Johannesburg, KwaZulu Natal and Fort Hare; and independents and M&E consultancy groups such as Feedback, Khulisa, MK Consulting and Southern Hemisphere.

In summary, creating an enabling environment for evaluation aimed at strengthening accountability, transparency and managing results is larger than SAMEA, but includes it as a leading national professional association. Creating an enabling environment, for the most part, is led by the national government strongly supported also by funded national and international initiatives, as well as other players including state departments, foundations, universities and independents. At this early stage, strengthening the enabling environment in the country entails a strong commitment by government, specifically, as well as partners, to accountability, transparency and managing by results. Government leads by promulgating a corpus of legislation presently institutionalizing M&E systemically at local through national levels of government, though a shortage of skills at this early stage hampers accountability and managing by results. And, with SAMEA as one player building capacity to monitor and evaluate policy implementation and programmes in and outside government, it provides a platform for debate for feedback from a specialist M&E citizenry, and it contributes to developments in evaluation. SAMEA, as a national professional association in collaboration with partners, contributes to an environment for strengthening accountability and management to deliver on outcomes.

National evaluation capacity development in South Africa requires some debate to achieve an understanding of it as a country-led evaluation system aimed at moving from policies to results or outcomes. In this regard, the Board believes it has a role to play.

Segone's (2007: 31-32) capacity development framework, addressing the demand as well as the supply side of evaluation in countries, provides a valuable tool to this end. Along 2 axes, he considers the "technical quality and trustworthiness of evaluation" on the one hand, and "the enabling policy environment" on the other hand, in the end arriving at a taxonomy of country-led M&E systems. Of four classifications, SA arguably escapes the category of "vicious circle countries" where evidence provided government is "technically weak and policy-makers have little capacity to make use of it." And, like most countries, it aspires to becoming a part of "virtuous circle countries" where evidence provided is "...technically robust and is being used increasingly for decision-making." Subject to debate is whether as a country SA arguably may be appropriately categorised as an "evidence supply-constrained country," where evidence is technically weak, but is increasingly demanded by policy-makers. In this case, technically weak evidence reduces the quality of decision-making and therefore the quality of services delivered. It follows that policy-makers are likely to resent being held to account on the basis of inadequate evidence, and thus that the priority should be to adopt measures to increase the quantity and quality of evidence. Here the challenge is to strike the balance between quickly making improvements to evidence, whilst laying the foundations for better performance of the country-led M&E system in the long run.

Whether the above better describes M&E systemically and more so than the category "evidence demand-constrained countries" foregrounding improved quantity and quality of evidence, and where it is not demanded because policy makers lack the incentives and/or the capacity to utilise it, may be moot. Nevertheless, the framework usefully extends our understanding M&E systemically in terms of evaluation supply and demand. Debate in SAMEA also has turned our minds to this issue Two metaphors have been useful: one to depict systemic M&E in the country, and a second reminding of the purpose of evaluation, and a discussion of a substantive evaluation emphasis to pursue.

Summarizing some of the discussions taking place within SAMEA, the Board takes the view that the county-led system of evaluation being developed here should entail both research-oriented evaluation as well as being guided by evaluation frameworks. The former, in our view as 'force majeure' in the base of a 'pincer' (like a pair of buffalo horns) provides rigorous data for decision-making and increasingly persuades stakeholders to use evidence to make better decisions and improve. The latter, in our view, and represented

in the arms of a 'pincer,' increases the reach of evaluation beyond the norm, sensitise to the 'insider' voice to find ways to better achieve results, and in the end trains evaluatees within the system to self-evaluate and improve, facilitated by evaluation specialists.

We hold, too, that in developing evaluation systemically here, we should avoid re-inventing the wheel, and derive strength from using researched evaluation frameworks conceptualised and tested internationally, and, adapt tested thinking to build into the system here indigenous conceptions of evaluation well adapted for M&E in this country.

Within this context more specifically, we make the case for adopting an internationally recognised evaluation framework not well known or understood here, to strengthen evaluation systemically, which we refer to as facilitated self-evaluation. As argued by David Fetterman (2005), the framework synergistically extends mainstream evaluation practices concentrated at the base of the 'pincer,' so evaluators also reach out into institutions and communities where interventions have been, to facilitate self-evaluation, train evaluatees to analyse data and improve their own practice, and thereby the system. In the end, the international experience suggests, a national evaluation system without evaluatees self-evaluating to improve their own practice may limit its reach and thus its power to improve itself systemically and achieve its outcomes.

Strengthening equity-focused and gender-sensitive evaluation systems and evaluations

Following from the above, and David Fetterman specifically, the SAMEA Board actively advocates for the values of equity, gender, social justice, empowerment, as well as improvement and an internal locus of accountability, amongst others. The case for these values is made through successive Key Note presentations by Fetterman at the SAMEA Conference and Workshop in 2001 and Workshop Series 2012, simultaneous and linked to the case for indigenizing M&E here drawing explicitly on Nan Wehipeihana's thinking and experience in New Zealand.

And, consistent with conference themes, the Board increasingly considers important for ongoing advocacy of values in evaluation. A case in point, David Fetterman in 2011 and 2012 advocated for values explicitly underpinning empowerment evaluation in Key Note presentations and workshops year-on-year, to make them known and subject them to debate here, much as he has done internation-

ally. A further benefit of continuity is not only identifying and advocating for values, but for values which cohere; his evaluation framework providing a logic binding the values underpinning his approach and hence evaluation thinking systemically. The Board also recognises what may be considered mainstream values implicit in evaluation approaches, adding to them through its conferences and workshops explicit values cohering in a framework to increase the reach of evaluation practice in institutions and communities.

Strengthening a sustainable strategy to enhance individual capacities to conduct credible evaluations

As the longest established entity strengthening the enabling environment for evaluation in South Africa, SAMEA has also a track record of enhancing individual capacity to conduct credible evaluations. In collaboration with the national and provincial governments, as well as with foundations, universities, independents and others, SAMEA grows individual M&E skills through annual capacity building workshops presented by local and international experts. Preceding its bi-annual Conference and in alternate years, SAMEA organizes a Workshop Series comprising in the order of 10-20 workshops, for the express purpose of enhancing individual M&E skills. Annually, these attract between 200-500 delegates as well as a growing group of 'emerging evaluators' sponsored on a competitive basis, to upgrade their evaluation skills, assist with job information and placement, and update on international best practice and latest developments in the field. In 2012 the Workshop Series held outside Gauteng (the economic centre of the country) in KwaZulu Natal, aimed to build capacity where most needed, and to launch a provincial association as stand-alone M&E association. This also provides a model for strengthening individual capacities to conduct evaluations which SAMEA has in mind to replicate going forward, as it provides capacity-building within a province as well as establishing a stand-alone provincial M&E association to organize capacity building and enhance credible evaluations provincially.

SAMEA's bi-annual Conferences, furthermore, strengthen M&E capacity to conduct credible evaluations through sharing M&E experiences. Common to paper presentations, round table debates and panel sessions by state, local and international experts, is not only debate of approaches and tools but also exchanging experiences on practicalities which arise when conducting evaluations, to enhance their credibility.

In addition, SAMEA actively links to other organizations with similar objectives to its own. It did this in 2011 with the Wits Program Evaluation Group (Wpeg), a university-based group managing a database of materials from 25 specialist evaluators developing the field internationally, and intended as a resource to both strengthen capacity and the credibility of evaluations. Wpeg also organized a Virtual Symposium in parallel to the SAMEA Conference 2011, to extend debate to all at a price they could afford, and it intends to produce 5 or 6 e-texts on programme evaluation methodology for publication through its website (www.wpeg.org.za). Both initiatives have in mind building capacity and enhancing the credibility of evaluations.

Bottlenecks and challenges

Perhaps the most significant bottleneck for SAMEA Board members is work overload. Typically, members of the Board are busy professionals working long days on challenging assignments, to which is added SAMEA business. Whilst the latter may not be overly onerous, it nevertheless impacts Board member time and limits the time they are able to give to Board business, particularly in a Conference year. With this in mind, the Board in 2012 experimented with its Secretariat adding a stipended part-time position with designated time to spend on SAMEA business. This assisted the Board to consolidate its activities, and give practical effect to organizing its annual capacity building Workshop Series in KwaZulu Natal, establish a formal KwaZulu M&E association in Natal, found the African Evaluation Journal (AEJ), and others.

A second bottleneck, as mentioned earlier, is stabilizing its income/funding stream. This was achieved in part in 2012, with some success, by turning around the Workshop Series to break even at least, and by targeting state departments and independents to seek Institutional Affiliation (IA) status with SAMEA. The former is anticipated to strengthen the Association's financial position, and if successful, the latter should on its own create a revenue stream more-or-less equivalent to that in the past generated from Individual Membership fees and, thus, also contribute to easing the financial bottleneck of the Association.

To this end too, the Board adopted a principle to apply to its expenditures, namely that disbursements should be matched, pretty much, by income derived from them. With this in mind and a credit balance in the bank, the Board in 2012 has begun to re-think its

organization and activities, and on this basis recoup expenses and stabilize funds in hand. Examples in this financial year include: the Workshop Series, developing 'emerging evaluators', part-time Secretariat, travel expenses of Board members, and hiring a workshop/conference organizer.

And in-kind support of SAMEA by an Institutional Affiliate providing office space, connectivity, printing and office equipment, and a facility for SAMEA Board meetings, addressed another historical bottleneck: physical space with facilities to house the Secretariat and a street address for the Association. We owe the IA a deep debt of gratitude.

Progress and results

The Board made significant progress on several fronts.

With SAMEA sharing similar objectives on M&E to DPME with respect to strengthening capacity building and enhancing the credibility of evaluation, both agreed to form a Standing Committee (SC) and held regular meetings in 2012 to find common ground for co-operation on matters relating to evaluation. A general Memorandum of Understanding (MoU) signed by both parties, cemented the relationship and set the scene for future collaboration. The MoU expresses the desire to collaborate on M&E issues of mutual interest. It assumes DPME as custodian of evaluation nationally and that it places a high value on having a committee formally linking it with SAMEA as national association, and it records SAMEA to be an independent voice, namely that of an outside expert advisory national M&E association and critical friend.

With CLEAR World Bank advisors' experience in South America in mind on the form such a committee may take to be productive, the SC took a decision to constitute itself as an informal and low key committee, rather than being hierarchical with rigid protocols and structures, and to focus on specific areas of common interest to take forward. One result has been a three-way collaboration in 2012 to organize and run the SAMEA-DPME-DEDT Workshop Series in Durban. The SC now plans to make the results of state evaluations more widely known in government, and publically, especially disseminating findings of 'best practice.'

Board meetings became more productive in 2012 with a shift from teleconference to face-to-face meetings. Besides teleconference meetings being difficult to organise and run, invoices justify face-to-

face meetings as these were less than the cost of teleconferences. The shift made a significant difference to the business of meetings, and it strengthened confidence in decisions and activities. Developing a Plan of Action has been one consequence, which has helped Board members focus on listed tasks and keep focussed on them, and it enabled members to ease into their responsibilities for the Biennial Conference in 2013.

Key enabling factors

Two key enabling factors during 2012 which may be of interest to other associations are: a willingness of Board members to serve, to support and decide; and protecting our balance sheet to grow cash in the bank. Both enabled the Board in its core business, namely, to serve the vibrant M&E community in the country.

First, there is tacit consensus that willingness of members to serve strengthened its business in 2012. Willingness to participate in debate, support new thinking and make decisions, even when protracted by negotiations and when different positions were taken, advanced the Board's Agenda and its service to members. Examples enabling the Board did its work in the past year include: changing the individual membership fee collection system, signing the MoU with DPME, deciding Key Note speakers and workshop presenters for the Workshop Series 2012, Conference Theme 2013, and the like.

Second, it goes without saying that having money in the bank enabled the Board to consider options to serve its membership which otherwise may be difficult to discuss. Key in 2012 was for the Board to maintain and strengthen its balance sheet, and seen also in the principled decision it took: to match disbursements with income covering it. It shouldn't be underestimated how powerfully cash in the bank worked for the Board in 2012. One example is it enabled the Board to take the risk and decide to organise and run the annual Workshop Series outside Gauteng where experience shows workshops to be viable, and to run it out-of-province where conventional wisdom in SAMEA holds that it may not be viable both in terms of delegate numbers and hard cash. In addition, attracting 40 more 'warm bodies' than planned for in the Workshop Series in 2012, also indicates how powerfully collaborations can work for both SAMEA and its collaborating partners, to achieve beyond what either may otherwise not be able to achieve alone.

Innovations going forward and lessons learned

Two innovations are suggested going forward: an evaluation '*legotla*' or forum for the Board and untried suggestions to consider for Conference 2013.

Of the first, whilst most time in Board meeting is given over to policy, organization and activities, not much time is given for debating substantive M&E issues as these influence and are influenced by the business of the Board. Suggested for 2013, thus, is the Board arranging a '*legotla*', or forum, aimed at substantive exchanges, debate and decisions on M&E entailed in its business. Papers could be presented and issues debated, to clarify issues and even develop position statements.

With respect to the pre-Conference Workshop Series and Conference 2013, several innovations are suggested. First, a Panel Session of DGs from national state departments where they present accomplishments and challenges, and to invite comments from the specialist M&E and informed citizenry. Underlying this is the intention to create an expanded culture of accountability at conferences, by providing DGs with a platform for reporting and soliciting feedback from an informed citizenry. Secondly, to have a paper session created specifically to connect papers, for example from the scientific community making the case for measurement and rigor in evaluation from schooling to profession. An example may be making the case for Advanced Mathematics in secondary schools, linked to a reminder of the importance of rigor in data and results in a case from research in Geo-chemistry, linked to evaluation of Engineering courses to prepare for quality entrants into the profession, linked to the scorecard as tool for gauging worth of engineering firms to qualify for government contracts. Third, a workshop on the back-end implications of implementing new frameworks in adopting institutions. The case can be made with reference to the financial sector where this has arisen from actuarial science graduates implementing new frameworks in financial institutions, to explore the applicability of back-end analysis in other sectors.

Next steps

As it evolves presently, the Board has in mind a number of 'next steps'. One of them is to build strong collaborative partnerships

with organizations sharing SAMEA's aims, to strengthen M&E activities beyond what it, or its partners, would be able to do alone. With Workshop Series 2012 in mind, collaborations of this kind are part of 'next steps' for the Board and may provide growth for its partners going forward.

The Board of Directors also aims to strengthen its income stream, to remain an independent M&E player nationally. The 'no money' concept for M&E associations seems under challenge in SAMEA in two respects: it is too demanding on volunteers and their resources; and two, there is a growing need of a part-time Secretariat to carry more of the work load of Board members. As above, steps are in place to create a steady income stream for the Association, which should be pursued by the Board going forward.

The Board also has put in place steps to increase the SAMEA membership pool and its activities which should better position the association to influence evaluation nationally. As above, new categories of membership (Institutional Affiliates) are in place and a strategy is in place to increase Individual Membership, the onus now being on the Board to use them to increase membership and influence. In parallel with these, membership can be strengthen through timely postings on its listserver, an enhanced website with regularly posted items of information and resources, newsletters, hardcopy of the AEJ included in what membership gets from SAMEA, and the like. These are in place and will need substantial inputs to grow membership beyond targets set to be achieved in 2012.

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SRI LANKA: SRI LANKA EVALUATION ASSOCIATION (SLEvA)

THE PAST, PRESENT AND FUTURE

Prof Nilanthi Bandara

President, SLEvA

Background

SLEvA is the brain child of a small but very renowned group of like-minded professionals of diverse fields, and development practitioners who felt the need for more transparency and accountability in the development processes of the country acting together to foster, nurture and develop concepts towards common good and betterment of society. It was initially catalyzed by UNICEF and the Governance project of UNDP under the ministry of Plan Implementation. The very first meeting of SLEvA general membership was held in September 1999 where a constitution to guide the functions of the association was adopted and the first executive Council was elected. The vision of SLEvA is: *“Promotion of an Evaluation Culture in the Country”*

The main objectives are:

- To promote evaluation as an integral element in the development process
- To contribute to better management of development processes in Sri Lanka
- To promote transparency and accountability in Governmental and Non-Governmental development organizations/ processes

The Association was registered with the Ministry of Social Services as a non-profit, non-governmental Civil Society Organization in 1999. From the very beginning the Association has remained as an independent professional organization with no affiliations even while collaborating strongly with the Government to achieve its vision, to promote an evaluation culture as an integral element in national and sub-national levels in Sri Lanka. Initially the functioning of the Association was through informal networks and charter and bylaws adopted. Now the Association is legally recognized by government.

SLEvA is administered by an Executive Council of 11 members elected bi-annually at Annual General Meetings. Executive Council consists of President, Vice President, 2 Joint Secretaries, Treasurer, Asst. Treasurer, Editor and four other Council members. The Executive Council is assisted by sub-committees drawing members from the general membership formed as necessary for different activities. All these members contribute their time for the Association on a voluntary basis. A secretariat consisting of one full time executive secretary assists SLEvA in administrative work.

From the inception SLEvA had taken a conscious decision not to do consultancy work or carry out evaluation work so that the credibility of the Association is not compromised at any time and SLEvA can always play an advocacy role. However, there is no restriction on individual members to conduct evaluations. In fact SLEvA acts as a focal point where information about professionals in evaluation and consultancy work are available and distributed.

Membership of SLEvA, which started at a mere 35, is presently 201 and comprises government officials, academics, members from NGOs and CSOs and private sector consultants. There are two categories of membership, individual and corporate membership. We have at present 5 corporate members.

Strategy and implementation

In line with its vision SLEvA activities are focused on four key areas:

- Capacity building
- Information dissemination and sharing
- Assisting policy formulation
- Networking

SLEvA contributions in these key areas are discussed below.

Capacity Building

From the beginning, recognizing the dearth of evaluation professionals in the country, SLEvA's main thrust area had been building of evaluation capacity in the country. These capacity building efforts had targeted a very wide range of audience: government officials, NGO workers, academics and students. SLEvA has managed to develop evaluation capacity in the country through various activities, the principle ones being:

- Conducting national conferences / seminars for sharing of experience in evaluation and related aspects
- International conferences on current themes on evaluation
- Professional development workshops for capacity building in M&E

National level conferences and seminars are generally held annually where the main target group is local participants. At these forums we provide a platform for local evaluators to share their experiences and get feedback from experts in the field of evaluation. We have been fortunate to have eminent professionals in the field of evaluation such as, Dr Adil Khan, Dr Ray Rist and Dr Howard White to conduct seminars for our members, as well as others who are involved in the field of evaluation. The exposure thus provided was indeed very valuable in building capacity of evaluation in the country.

One of the key strategies employed by SLEvA to develop local capacity is to hold International Conferences. Our very first conference was held in 2001 under the theme "Evaluation, Good Governance and Development". The second international conference was held in 2003 on the theme "Development Evaluation for Improving Outcomes". Although international participation was not up to expectation, the local participation made up for it with the participation of high level government officials and heads of UN and other donor agencies. The turning point came in 2007 with an international conference of large scale with very wide international participation. The conference was held under the theme "Evaluation: An essential element in the development process". The extensive participation of both international and national participants brought SLEvA to the limelight and due recognition as a mentor promoting evaluation culture in the country. Since then SLEvA is committed to having biannual international conferences to further enhance this. We were successful in being able to hold an International Conference under the theme "Evaluation for Development Results" in 2009 and under the theme "Evaluation for Policy and Action" in 2011. In keeping with this tradition in 2013 also we are holding an International Conference under the theme "Evaluation for Change".

These International Conferences were multi-purpose in nature. While promoting evaluation culture in the country and providing a platform for a meeting of professional evaluators, they also brought in eminent academics and personnel in the field of evaluation whose expertise we were able to use to develop capacity in evalu-

ation in the country. Since 2007 post and/or pre-conference workshops conducted by pioneers became a feature of our International Conferences. These also attracted many local and international participants which ensured sustainability.

In addition to these, SLEvA managed to organize professional development workshops from the very beginning. These were conducted by international resource persons who were mainly invited when they are visiting this part of the region and by local experienced evaluators. SLEvA managed to gain much recognition amongst public officials particularly from Ministry of Plan Implementation and evaluators in the private sector and NGOs. Generally around 3-5 capacity building workshops are conducted through SLEvA and the demand is ever increasing. As an example, in the year 2012 four workshops were conducted, the first on the theme 'The Past, Present and Future of Evaluation Research' conducted by Prof. Ray Pawson, a renowned international expert in the field of evaluation in March; a workshop on 'Evaluation Management' in July and a workshop on 'Quantitative Methods in Evaluation' in August. Also in August 2012, in collaboration with the Consortium of Universities on Teaching Evaluation in South Asia (TESA), a professional development workshop on the theme 'Mixed Method Approaches to Evaluation' was conducted by Prof. Donna Mertens of the Gallaudet University USA. One of our strong areas is participatory and empowerment approaches in evaluation and numerous workshops had been conducted on this.

Another unique opportunity we got was to coordinate the Teaching Evaluation in South Asia (TESA) project which was funded by IDRC. The project was initiated in 2009 to bridge the void in training opportunities available in the academic institutions in South Asia. The main objective of TESA was to develop a curriculum consisting of 8 modules for a post graduate diploma in evaluation. Each participating institute was responsible for developing a module. Currently, this curriculum for the post graduate diploma developed by the six institutes: ASCII in Hyderabad, India; IIHMR in Jaipur, India; University and Industry Alliance of Dhaka University in Bangladesh; IbSina in Afghanistan. The courses at the University of Sri Jayawardanapura and Sri Lanka Evaluation Association in Sri Lanka are being fine-tuned. SLEvA not only coordinated the project but also developed a key module 'Evaluation Approaches.' Six SLEvA members were involved in this and in the process were able to participate at various meetings and conferences, thus enhancing their capacity as well. In testing these modules SLEvA has taken the initiative and tested out 3 modules in several small group workshops.

All the above mentioned training programs have had high participation and have been well accepted. Considering all these it can be said that SLEvA's contribution to build up capacity of evaluation in the country and the region is significant.

Information dissemination and sharing

Our second objective of sharing of information is primarily through electronic media. Our website www.sleva.lk is frequently updated to include all current activities of SLEvA as well as other relevant information. Information we receive from various organizations about events, reference material, current findings, opportunities for employment and consultancies are immediately sent forth to the general membership.

SLEvA publishes a bi-annual Newsletter, accessible through the web site which also is a source of information for the members. The proceedings from all the International Conferences since 2007 are published and available in print form and electronically. Special presentations made by subject specialists on a timely basis by national and international resource persons is another way through which we share and disseminate information.

Assisting policy formulation

One of the strengths and reasons for SLEvA's success is its strong collaboration with the Ministry of Plan Implementation (MPI), as a CSO partner in influencing policy and implementation. From inception itself SLEvA managed to maintain close ties with the Department of Foreign Aid and Budget Monitoring of the Ministry while maintaining our independence and integrity. This way we were able to influence the Government's policy on evaluation to a considerable extent. One of our key initiatives as a result of this collaboration was the preparation and submission of Draft National Policy paper on evaluation to MPI to enable the Ministry to commence a process in formulating a National Policy. This was initiated in response to a request made by the then Secretary to the Ministry of Finance and Policy Development and Implementation at the International Conference in January 2003. The Association formulated the first draft in April 2003 and presented it for an open consultation session in June of that year. With revisions to adjust to policy changes the final document was presented in June 2006. While the process took time, the acknowledgment by the Government of the need for an evaluation policy marks a milestone in strengthening an evaluation culture in the country and the draft policy is a significant prod-

uct of SLEvA. The Ministry of Plan Implementation has taken steps by now to institutionalize evaluation practice across the government in support of results-based management (De Silva & Samaranayake, 2009). Details of the Draft National Evaluation Policy can be obtained from SLEvA Websites: <http://www.nsf.ac.lk/sleva/pdf/nepdraft.pdf> and http://www.sleva.lk/tmp/SLEvA/Draft_National_Evaluation_Policy.pdf.

Networking

SLEvA's success can also be attributed to the strategic partnerships formed over the years. Our main strategic partner was the Government through the Ministry of Plan Implementation who had been the partner in all our main activities, conferences, professional development workshops, etc. Both parties benefitted from this alliance. While SLEvA gained recognition and credibility the Ministry was able to develop the capacity of its officials and gain more exposure.

UN collaboration was instrumental in SLEvA's growth. UNICEF and UNDP had been assisting us in most of our activities. This assistance was not so much in financial resources but more as a catalyst in making networks, accessing professional resources and above all imparting the strength of conviction in the role that a civil society organization like SLEvA could play in supporting the development process of the country (De Silva & Samaranayake, 2009).

The German Agency for Technical Cooperation (GTZ, now GIZ), JBIC, and the American Red Cross are the other agencies who extended collaboration for various SLEvA activities in capacity building and dissemination of information. These partnerships were instrumental in achieving our objectives.

We were also able to establish links with other key evaluation organizations. SLEvA has been a member of the International Organization for Cooperation in Evaluation (IOCE) since 2006. We are proud of the fact that the recent Past President of IOCE, Ms Soma de Silva, is a Past President of SLEvA. We hosted the formation of the Evaluation Network of South Asia (ENSA) an initiative of the UNICEF Regional Office. We have recently entered into a collaborative partnership with Community of Evaluators of South Asia (CoE/ South Asia).

Numerous information exchange visits made by many delegations is a testimony to SLEvA's recognition as one of South Asia's leading Evaluation Associations. We've had the opportunity to share our

experience with visiting delegations from Afghanistan, Republic of Yemen, Nepal and Uganda, who wanted to study the SLEvA model of a civil society organization collaborating with the Government for a common cause. We also shared experiences with the visiting study team from the International Program for Development Evaluation Training (IPDET) which gave us an opportunity for sharing experience with delegates from various countries.

As a testimony of the recognition achieved by SLEvA, officials from the Global Environment Facility (GEF) Evaluation Office in Washington DC, who visited SLEvA in February 2012, requested us to collaborate with them in the capacity of an independent review panel in evaluation of GEF support to Sri Lanka. They also became a corporate member of SLEvA. Recently another meeting was held with officers of Evaluation Office, UNDP headquarters, and possible collaboration was discussed.

Bottlenecks and challenges

Many challenges had to be overcome to come this far. The main amongst these are:

1. From inception SLEvA upholds voluntarism among its membership which had been a strong contributory factor. However, the limitations should be taken into consideration for sustenance of voluntarism (Tudawe & Samaranayake, 2008). Although there is no limit to the need and demand for activities that can be done through SLEvA, the human resources available are limited primarily due to the voluntarism in SLEvA activities and limitation with respect to time that can be spent by members.
2. The second challenge we face is the limited financial resources available for our activities. Throughout SLEvA has maintained its position laid down in the Constitution, that it would not undertake consultancies or carry out evaluations for financial gain, which leaves the burden of sustenance on the Council members. Hence, even if SLEvA likes to deliver professional development programs free of charge to reach out to a wider audience, it is difficult to do so.
3. The other challenge we face is that though we work in close collaboration with the Government we still are a non-governmental organization and as such have limited influence over government policies.

Progress and results

In spite of the above mentioned challenges we have made considerable progress. As presented earlier we have conducted 3 extremely successful international conferences and a large number of professional development workshops. Now we have a membership of over 200 individual members and 5 corporate members. We have quite a few publications to our credit. We are also a party to a consortium which developed a post graduate diploma in Evaluation for South Asian Universities.

SLEvA takes pride in its recognition at both national and international level.

Key enabling factors

The main factor behind our success is the commitment of our members. Though small in numbers, SLEvA members constitute a close knit community. They respect the voluntarism of the organization and contribute as and when they can.

Good will and assistance of donor agencies is another factor which has enabled us to achieve most of our objectives irrespective of financial constraints.

Another key factor is the Government's blessings and collaboration which have given us credibility.

Innovations and lessons learned

Since sustenance of SLEvA became a major concern, in 2009 the then President of SLEvA, Ms Mallika Samaranayake, initiated and established an endowment fund for SLEvA utilizing the funds generated through various activities of SLEvA. This has enabled us to conduct our day to day activities without too much concern.

Next steps

Although SLEvA had been very successful in promoting an evaluation culture in the center of the country, still we have not reached the provinces. As the next step we are in the process of working with government officials in the sub-national and provincial level to promote evaluation and to further develop capacity of evaluation at these levels.



Part 4

The role of VOPEs in fostering equity-focused and gender-responsive evaluations and evaluation systems

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THE ROUGH ROAD OF PIONEERING CHANGE. AGDEN'S ENGAGEMENT WITH GENDER AND HUMAN RIGHTS RESPONSIVE EVALUATION

Enid Kaabunga

AGDEN Chair

Florence Etta

AGDEN Vice Chair

Background

The Africa Gender and Development Evaluators Network (AGDEN) was created in 2002 as a special interest group of the African Evaluation Association (AfrEA) by UNIFEM (now UN Women) and AfrEA. Its aim is to be a leader in providing expert evaluators with strong skills in the application of gender and human rights principles to evaluations in Africa, as well as to influence evaluation policy and practice in Africa from a gender and human rights perspective. This remains the mandate of AGDEN.

Research conducted by AGDEN in 2008 revealed that there is still a gap in evaluation capacity, as well as capacity development in Africa. The demand for evaluation is still largely donor driven, and much of the evaluation work is being undertaken by specialists and professionals who have credentials in areas other than monitoring and evaluation (M&E), including research think tanks, individual academics, and management consulting firms. In the public sector, investments were being made in national capacities and institutions for M&E, and there was therefore growing capacity, but this was still rather weak.

The commissioners of evaluations who were interviewed described the quality of evaluation capacity in their implementation countries as being poor or fair¹. As one respondent from Kenya stated "Most of the evaluators in Kenya are autodidacts. Very few have M&E training and the evaluation capacity that I see is not great". They expressed the hope that professional associations would improve the quality of evaluations, as well as evaluator skills and attitudes, although they recognized that investment would still have to be made in teaching.

This study also found that efforts at strengthening development evaluation capacity at the national level are still very dependent on individual effort and, on that account, are generally uncoordinated and ineffectual except for a few exceptions such as the South Africa M&E Association (SAMEA) and AGDEN. These efforts are still heavily dependent on donors or national governments, for example, the Public Service Commission supports SAMEA. At the same time, UNICEF was supporting the Kenya Evaluators Association.

AGDEN has evolved from a core group of 14 members in 2002 to a network of 107 members from at least 18 countries in Africa, as well as the USA, United Kingdom and Canada. Membership is open to practitioners and leaders in gender and/or human rights and monitoring and development evaluation in Africa. In 2007, AGDEN was registered in Kenya as a company limited by guarantee, with no share capital and has since then run a secretariat in Nairobi, Kenya.

In its ten year history, AGDEN has operated a lean organizational structure with three substructures: the Steering Committee (SC), Secretariat, and the body of members. In this period there have been 2 Chairpersons. The current structure was created in October 2006. Before then, AGDEN was implemented by EvalNet as a project of UNIFEM (now UN Women) and AfrEA. EvalNet was thus instrumental in identifying and bringing the founding core group members together around a common cause. The Steering Committee (SC) is headed by a Chair person. Other non-executive SC members represent north, south, west, and east Africa, as well as Francophone and Anglophone Africa. The nine-member Steering Committee sets policy and direction while activities are undertaken by members and other consultants. Florence Etta served as the first Chair of the Steering Committee between October 2006 and January 2012.

Strategy and implementation

AGDEN's strategy, to achieve its mandate of providing expert evaluators in Africa with strong skills in the application of gender and human rights principles to evaluations, is described below in four broad categories:

- Enhancing individual capacities to conduct credible and useful evaluations through the development of a training toolkit, provision of training workshops, convening panel discussions at conferences, facilitating online discussions, and web-based dissemination of information.

- Creating an enabling environment that is supportive of evaluation by contributing towards mandatory monitoring of how gender equality is addressed at the national level, promoting evaluation standards, and contributing towards policy evaluation and decision-making.
- Strengthening equity-focused and gender sensitive evaluation systems and evaluations.
- Strengthening the organizational capacity to deliver services through institutional development processes and training of staff and members.

Enhancing individual capacities to conduct credible and useful evaluations

As a network of evaluators, AGDEN has the primary responsibility to strengthen the capacity of its members, and as an Africa-wide network, to strengthen the capacity of all M&E practitioners on the continent and beyond to conduct credible and useful evaluations that are responsive to the principles of gender equality and human rights. AGDEN uses a multi-pronged approach to reach out to evaluation practitioners including:

- Development of a toolkit* – AGDEN has developed a toolkit on Gender and Human Rights Responsive M&E,² which is in its final stages of publication. This toolkit is targeted at development practitioners and provides information and practical guides on how to conduct M&E that is responsive to women and human rights. It was developed by experts in gender, human rights and participatory M&E from Africa, and has undergone several revisions to ensure that it is relevant to practitioners in all regions of Africa. AGDEN is in the advanced stages of publishing this toolkit.
- Training workshops for evaluation practitioners* – Over the last four years, AGDEN has conducted ten training workshops in Kenya; South Africa; Jordan; the Czech Republic; Ghana; and, Burkina Faso, for no fewer than 150 participants from civil society organizations and academic institutions, as well as for government agencies. The workshops are all aimed at building capacity of participants to conduct M&E that is responsive to gender equality and human rights.
- Panels and presentations at evaluation conferences and forums* – Since 2002, AGDEN has hosted panels and made presentations

that were aimed at eliciting dialogue and discussion on gender and human rights in M&E. Since 2009 AGDEN has been a regular host of panels, workshops, exhibitions or papers at the most significant continental evaluation conferences; African Evaluation Association (AfrEA) and the South Africa M&E Association (SAMEA). AGDEN was the second place winner of the AfrEA 2012 Member Development prize.

AGDEN has also made a showing at international conferences hosting panels, giving workshops and discussion fora at: the International Development Evaluation Association (IDEAS) Global Assemblies in 2009 and 2011, the European Evaluation Society (EES) conferences in 2010, and the American Evaluation Association (AEA) conferences.

- d) *Online discussions* – AGDEN has a lively email discussion list and in October 2010 formed a web-based Community of Practice for gender, human rights and evaluation practitioners and professionals. This group is currently in the process of reactivation and re-engineering.
- e) *Web-based dissemination of information* – AGDENews the AGDEN electronic newsletter, has been in publication since 2009. To date, twelve volumes have been distributed online to members and other evaluation practitioners. The newsletter contains updates on AGDEN's activities as well as information about worthwhile events and discussions in the fields of gender, development, and M&E.

Through its website (www.agden.org), AGDEN also shares information and links related to its core mandate of gender, human rights and evaluation. These are available to all visitors of the website.

Creating an enabling environment for evaluation

AGDEN is a continental organization and some of its work has been aimed at contributing towards the mandatory monitoring of how gender equality is addressed at a national level. In 2006, AGDEN, working as a member of the UNIFEM Africa expert group on gender and the New Aid Modalities, created a set of gender sensitive indicators together with an accountability and assessment framework for gender equality. This was done in the context of the Paris Declaration and other aid instruments. These indicators were reviewed and revised by AGDEN at a workshop held in Nairobi in 2007, and presented at a number of international fora namely: the Africa

regional preparatory meeting for the third High Level Summit on Aid Effectiveness in Kigali, Rwanda; the CSO preparatory meetings of the 3rd High Level Summit on Aid Effectiveness in Accra, Ghana, in September 2007; the African Women's Regional Consultative Meeting on Aid Effectiveness and Gender Equality in Nairobi, in 2008; and the 6th GENDERNET meeting at the OECD headquarters in Paris in 2008.

The AGDEN indicators influenced the work of the EC and UNIFEM as well as the indicators proposed in 2010 in the optional protocol for the final Monitoring Survey of the Paris Declaration and the Accra Agenda for Action. The results of this monitoring survey were presented at the Fourth High Level Forum, in Busan in 2011, where member states committed to:

- a) Accelerate and deepen efforts to collect, disseminate, harmonize and make full use of data disaggregated by sex to inform policy decisions and guide investments, ensuring in turn that public expenditures are targeted appropriately to benefit both women and men.
- b) Integrate targets for gender equality and women's empowerment in accountability mechanisms, grounded in international and regional commitments.
- c) Address gender equality and women's empowerment in all aspects of development efforts, including peace-building and state-building.

Over the last four years, AGDEN has been working towards the application of quality standards in evaluation primarily by popularizing the AGDEN approach to Gender and Human Rights Responsive Evaluation which it has been researching and developing as well as the African Evaluation Guidelines (AEG). The AGDEN approach and the AEG are included in the AGDEN toolkit on "Gender and Human Rights Responsive Monitoring and Evaluation", produced early in 2012 which is the basis for the AGDEN training given at workshops with the same title.

In the coming years, AGDEN plans to extend its reach to politicians, public administrators and other entities that influence policy-making and implementation, to develop their capacity to understand and use evidence on gender equality, produced by M&E systems. This will be done through training workshops and other fora for dialogue, both electronically and face-to-face. A proposal has already been developed for this, and AGDEN is currently seeking support to operationalize it Africa-wide.

Strengthening equity-focused and gender-sensitive evaluation systems and evaluations

Strengthening equity-focused and gender-sensitive evaluation systems and evaluations is the core mandate of AGDEN. Through its toolkit, training workshops, conference presentations, and online discussions, AGDEN conducts research studies, discusses, advocates and trains on integrating the key principles of gender and human rights (empowerment; equality; non-discrimination; transparency; accountability; and, participation) into the planning, implementation, and M&E of development interventions, programmes and/or policies. AGDEN has constructed a model for how these principles can be integrated with the five OECD-DAC evaluation criteria of: relevance; efficiency; effectiveness; sustainability; and impact.

For AGDEN, research is a primary starting point for all the training. Each AGDEN workshop includes a participatory action research session with participant evaluation practitioners. The research focuses on the practices, utility, and relevance of integrating gender equality and human rights into development evaluation. The research also expects (aims) to identify the capacity needs of practitioners so as to ensure that the training offered is relevant to the context. In 2009 AGDEN was commissioned by IOD PARC to conduct a rapid assessment of M&E Capacity Strengthening Mechanisms for Development Evaluation in Sub-Saharan Africa: Kenya, Rwanda, Tanzania, Malawi, Mozambique, Nigeria, and Sierra Leone.

Strengthening AGDEN's institutional capacity to deliver services

AGDEN aims to ensure that all its members have the capacity to practice, train and advise on gender and human rights in M&E at the national and international level. AGDEN therefore targets its members when selecting participants for the training workshops, and has conducted the following training for members:

- Training in outcome mapping.
- Training on new aid modalities and the Paris Declaration.
- Gender and rights-based M&E in development practice.
- Evaluation proposal writing.

The AGDEN secretariat and membership structure needs to be set up as a viable and sustainable organization. To date, two insti-

tutional assessments have been conducted, one on the organizational systems and procedures, and the other on the organizational readiness for learning and evaluation. Through these assessments, AGDEN identified key areas for organizational strengthening and is currently working to strengthen the weaknesses identified and to further strengthen the good practices.

Progress and results

After 10 years of work, AGDEN has made progress towards increasing the understanding and practice of integrating gender equality and human rights concepts and principles into M&E practice of in Africa.

As a direct result of research activities, pictures of how development managers deal with and integrate gender and human rights issues into evaluation are being constructed for the continent. Research conducted in Nairobi and Johannesburg, with a total sample of 171 respondents, sought to understand from programme managers and officers, their:

- knowledge of (familiarity with) key concepts in human rights, gender and development, and M&E;
- experience with M&E, gender and development, and human rights;
- use or application of key human rights and gender and development (GAD) concepts in their programming or M&E; and
- thoughts about integration of gender equality and human rights in M&E of development projects and or programmes.

Although 97.4 per cent of the respondents believe that it is a good idea to integrate human rights and gender equality into their programmes, only 58 per cent reported that the monitoring systems in their organizations incorporate elements of human rights and gender equality.

As hoped, the discourse on human rights and gender equality has now been amplified both on the continent of Africa and globally. IDEAS, the global association of development evaluators, invited AGDEN to two consecutive biennial conferences, in Johannesburg and in Jordan, to give workshops on the subject of gender and evaluation.

There is also an indication of a change in behavior of development practitioner towards the AGDEN goal of integration of gender and

human rights in evaluation. Follow-up reports from AGDEN trainees reveal that they have engaged in further learning on gender and evaluation; participated in web-based and face-to-face discussions on these topics; conducted training for their colleagues and other practitioners; and are now planning for, or submitting proposals, to conduct evaluations that are gender and human rights responsive.

AGDEN, as an institution, has also experienced significant growth in its capacity to deliver services. In the past year alone, membership of the network grew by 50 per cent, with almost all of the new members trained to conduct gender and human rights responsive evaluations. The network also has a secretariat that is progressively formalizing its structures and procedures. In the words of the director of AGDEN's host institution:

"The Network is now well positioned to become a force that will shape the global agenda in rights-based approaches in evaluation and, therefore, become a one-stop shop for such matters. AGDEN has done a commendable job in the few years that it has been in existence and the various tools that it has championed and developed are a case in point. Other than that, the networking opportunity it has provided for gender and M&E practitioners is priceless"

Key enabling factors

The commitment of the AGDEN leadership has been the most important factor in the growth of the network. For many years, AGDEN has had a President and Steering Committee that are committed to its vision and mission. They have made great sacrifices and have shown incredible zeal to push AGDEN to new heights. Without this level of commitment, the network would not have experienced the growth that it has.

Since its formation, AGDEN has maintained important strategic partnerships with organizations like UN Women (previously UNIFEM) and the Ford Foundation. These organizations have believed in the worth of AGDEN's work and continued to provide support, ranging from sponsorship of members to participate in international evaluators' meetings, to more recently funding for 1-2 year development interventions.

The highly skilled membership of AGDEN, with experts in gender, human rights and M&E, located in many countries of Africa, has enabled the network to develop and deliver products that are relevant to the target countries and of high professional standard. An

example is the development of the toolkit which involved members from six different countries, who not only contributed their technical skills, but also contextual knowledge. This process helped to ensure that the toolkit is usable and appropriate for a wide range of professionals across the continent.

Challenges and bottlenecks

The main challenge faced by AGDEN is its unreliable funding and resource base. AGDEN depends largely on donor support to conduct its activities. Even though a membership fee is charged, this constitutes less than 5 per cent of the annual budget. The network therefore experiences periods of very low activity when no funded project is being implemented. To date, the organization has received most of its funding from UN Women and the Ford Foundation. The organization is however pursuing relationships with other funding partners, in addition to strengthening and improving its consulting service as a way of improving sustainability.

Another challenge experienced by the network is its bilingualism. To date, conducting activities in French has remained a major challenge despite having a sizeable number of French speaking members. The network secretariat is located in an Anglophone country and key AGDEN documents are currently only in English. Some mitigating strategies instituted so far include: election of a Francophone secretary, and a Francophone representative on the board; translation of the AGDEN toolkit into French; and, sending out communications in both English and French to members on the mailing list.

Additionally, AGDEN is a virtual membership network which depends immensely on information and communication technology (ICT) tools and infrastructure for its work and administration. AGDEN has four ICT- related challenges namely:

- Members need to be ICT savvy to be adequately and appropriately engaged. This cannot always be guaranteed. For instance, seeking member information and updates of member documents such as CVs is often a major difficulty.
- Managing and coordinating member contributions to tasks present ICT related challenges and delays.
- On account of its continental spread, timing for meetings is often quite delicate.

- AGDEN needs special ICT applications which need to be developed for Africa by ICT developers, and that has not yet happened.

The last challenge experienced by AGDEN is in the method by which network activities are managed. The oversight, governance and management functions such as those currently undertaken by the Steering Committee are all conducted on a completely voluntary basis. This frequently involves members incurring expenses as well as spending a lot of their time to ensure that network activities continue. This frequently results in activities taking a longer time to complete than if a dedicated team was implementing them.

Innovations and lessons learned

AGDEN has recognized the value of using toolkits as cost-effective method of sharing knowledge. It has developed the AGDEN approach to Gender and Human Rights Responsive Evaluation, which is detailed in a toolkit and that it plans to share widely with evaluation practitioners in Africa. AGDEN is also in the process of developing guidelines that will make it easier for its members to prepare bids for evaluation projects.

Over the years, AGDEN has also realized the importance of documenting network experiences for posterity. Because AGDEN is a growing network with membership from various countries, there are few opportunities for its members to have face-to-face meetings. Similarly, the members of the steering committees are all in different countries. As such, unless a member is involved in a particular activity, they are not aware of what was involved in implementing the activity. AGDEN has therefore implemented strategies such as documentation of activities in project reports, and using the bi-monthly e-newsletter to share network activities with members.

It is also common practice at AGDEN to formalize solutions to any challenges experienced. At the time that AGDEN was set up, there was no list or template of the tools that would be required to maintain a network and its secretariat. Over the years, AGDEN has devised methods to overcome challenges as they presented themselves, thereby strengthening its secretariat. AGDEN has also developed an operations and procedures manual that formalizes AGDEN's management processes, and as the network grows further, these are being developed into stand-alone policy and procedures manuals for issues such as human resource management,

finance management and other tasks, for instance, the management of training events.

Next steps

The future plans for AGDEN focus on strengthening a number of key aspects as outlined below.

1. Strengthening the enabling environment.

AGDEN is planning to extend its reach to policy-makers and other decision-makers with the aim of increasing their capacity to understand and interrogate the responsiveness of policies, as well as policy processes relating to women and, more generally, to human rights through training and facilitation of dialogue on Gender and Human Rights Responsive Evaluation. This work is awaiting funding and is planned to start in Benin and Kenya before being rolled out to other countries.

AGDEN plans to conduct research on the policy environment in select countries to determine the factors which influence and/or hinder the use of evidence on women's rights. This information will be used to design future activities.

2. Strengthening individual capacities.

AGDEN plans to continue conducting training on Gender and Human Rights Responsive Evaluation for development practitioners throughout Africa and, on invitation, the rest of the world. Indications from AGDEN research show that the need for this training is still high.

AGDEN is currently revitalising its web-based activities, and will rejuvenate the Community of Practice (CoP) for moderated discussions on gender equality in M&E.

3. Advocating for equity focused and gender sensitive evaluation systems.

AGDEN is developing plans to work with grassroots organizations to set up evaluation and learning systems that are gender and human rights responsive.

4. Strengthen AGDEN's institutional capacity.

AGDEN plans to continue with its institutional strengthening of efforts and procedures to support the structure and work of the organization.

AGDEN also plans to continue to train its members, and is planning web-based training opportunities.

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AMERICAN EVALUATION ASSOCIATION (AEA): FEMINIST ISSUES TOPICAL INTEREST GROUP

PROMOTING FEMINIST AND GENDER RESPONSIVE EVALUATION APPROACHES

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A Brief History of the Feminist Issues Topical Interest Group

In 1992, at the American Evaluation Association (AEA) annual meeting in Dallas, a group of feminist evaluators, after a session that involved all the past presidents of AEA, reflected not only on the fact that these were all white men, but on the paternalistic manner in which certain questions had been answered. These women were deeply engaged in evaluation practice, identified as feminists personally, philosophically and politically, and had come together informally prior to this time to support each other and to discuss ways in which they might broaden the evaluation enterprise and encourage greater diversity of thought and participation and instill an appreciation for the important and valid role that social justice aims can play in evaluation work. At the time, ideas about the appropriate role of the evaluator were more narrowly defined than they are today and Participatory Evaluation and other forms of collaborative efforts in which the evaluator assumed (or could assume) the role of advocate, at any stage of the evaluation, were still contentiously debated by some. The idea that there could be such a thing as Feminist Evaluation was not taken seriously by others in the field.

But these were highly respected, strong and determined women. Between 1993 and 1997 these feminist evaluators collaborated with each other to offer AEA sessions and presentations that addressed gender inequities and the lack of gender representations within evaluation, focusing on the need for gender-responsive evaluation. Concurrently, the demographic composition of the field was changing; membership of the organization increased and the proportion of women among those professionals surpassed that of men.

At the 1997 AEA annual meeting in San Diego, the Feminist Issues in Evaluation TIG was formally approved by AEA. Donna Mertens, Joann Farley, and Elizabeth Whitmore, among others, were instrumental in the formation of this group. In an attempt to raise the profile of what they saw as critical and legitimate concerns for the field, they began to work on a proposal for a volume on Feminist Evaluation for one of the leading scholarly journals for their profession, "New Directions in Evaluation." The process proved to be long and arduous with frequent requests to the authors of the proposal to prove the merit and worth of the volume. It lay dormant for a period. After considerable efforts, they felt that the project might gain more traction with newer voices and invited Sharon Brisolara and Denise Seigart to take on the role of proposing a new volume. That volume- Feminist Evaluation: Explorations and Experiences- No. 96- was published in 2002. It is the only New Directions volume on Feminist Evaluation to date; however, a new volume edited by Brisolara, Seigart and Sengupta showcasing multiple authors on feminist evaluation and research is under contract to Guildford Press for submission in the fall of 2012 with anticipated publication date of 2013.

From 1997 to 2011, the Feminist Issues in Evaluation group members have conducted surveys on Feminist Evaluation, written letters to AEA regarding gender-balanced representation on expert panels and discussions, and have focused increasingly on soliciting and providing quality educational programs and workshops for evaluators at each annual AEA conference. The group has recently begun a blog and launched its own website in addition to collaborating on the upcoming Feminist Evaluation volume.

What is Feminist Evaluation?

Our work has resulted in a model of Feminist Evaluation that is founded on basic principles:

The first is that evaluation is a political activity; evaluators' personal experiences, perspectives, and characteristics come from and lead

to a particular political stance. The contexts in which evaluations operate (projects, contexts, interactions) are politicized and imbued with asymmetrical power relationships. As a result, Feminist Evaluators approach a project seeking to understand the political nature of the context from the very beginning of the project through reflexive processes, engagement with stakeholders, open-ended inquiry, and establishing trust among research participants.

Feminist Evaluation also holds that research methods, institutions, and practices are social constructs. As social constructs, research and evaluation methods, institutions, and practices have been influenced by dominant ideologies, including patriarchy. Those practicing Feminist Evaluation work to counteract the influence of limiting ideologies on methods by mixing methods, by using inclusive and participatory approaches, and by choosing culturally and socially appropriate methods.

A third principle is that there are multiple ways of knowing. Feminist Evaluation honors and searches for multiple ways of knowing, in part through deep and real engagement of a range of stakeholders. As a result, Feminist Evaluators may seek the answers to questions such as: What ways of knowing are valued in this (cultural, social) context (e.g., stories, emotions, artistic representations)? Do these ways of knowing vary by stakeholder/participant group?

Which forms of knowledge have the highest credibility (and does this depend on the source of information)?

The next three Feminist Evaluation key principles are related to social justice.

For example, an important approach to recognizing and addressing inequality is to begin with gender. We don't assume that you end with gender, however. Feminist Evaluation identifies gender inequities as one manifestation of social injustice. Discrimination cuts across race, class, and culture and is inextricably linked to all three. Gender inequities are an important **point of departure** for evaluation and FE begins its investigation by examining sex and sexual identity. However, for Feminist Evaluators multiple identities and cultural-political contexts are critical to the understanding of program dynamics and outcomes.

A fifth principle is that discrimination based on gender is systemic and structural. It is embedded in our major institutions: schools, religious institutions, media, government, and, certainly, pop culture. Efforts must be made to uncover policies and practices that

lead to discrimination if programs and outcomes are to be more accurately understood. Feminist Evaluators ask: What is the nature of structural and gender inequities within this context? What are the consequences of these inequities? What are the consequences of bringing systemic and structural inequities to light?

Finally, Feminist Evaluation holds that the purpose of knowledge is action, that action is an ethically and morally appropriate response of engaged inquiry. The degree and kinds of action need to be negotiated and must be sensitive to the lived realities of the people affected by our work long after we have moved on to other projects. Within Feminist Evaluation, there is a strong belief that we have a responsibility to those who provide information, who share their lives and time, and that research is for a purpose, and thus should be used for good.

Feminist evaluation is not restricted to particular methods and can be combined with other models.

An illustration of a feminist evaluation is a comparative evaluation of school health programs in the US Australia, and Canada led by Denise Seigart. The case study provides a means of exploring the challenges of incorporating feminist research approaches into such an evaluation. While conducting case studies of school based health care in these countries, she found that inequities in the provision of health care exist and are often related to gender inequities. Racism, sexism and classism were all noted, due to religious, economic, and cultural influences; all of these played a part in the quality and accessibility of health care in these countries. Examples of gender inequities in access to health care included the disproportionate influence religious organizations had on the provision of health care, the impact that tying health care to employment had on women and children, and the valuing (or devaluing) of women's work with regard to the provision of health care for children in schools. Reflections on the challenges of implementing an evaluation from a feminist perspective, as well as discussion of the potential for fostering community learning through a feminist evaluation approach, in the context of evaluating school-based health care, are presented in the forthcoming Guilford text mentioned earlier.

Strategies

The Feminist Issues in Evaluation Topical Interest Group (TIG) consistently strives to present sessions and workshops each year at

the Annual AEA conference which discuss the integration of gender responsive evaluation approaches and methods that integrate feminist theory. In the past, we have used the TIG newsletter to disseminate information about feminist evaluation efforts, highlighting individual practitioners. On occasion we have asked members to attend annual meeting sessions not typically open to feminist ideas to raise questions about gender or social equity. In the past several years, we have co-sponsored sessions with other TIGs interested in issues of social justice in order to encourage others to think about gender equity as well as to continue to push our own thinking and practice.

For example, in 2010, in an effort to broaden the spread of feminist and gender-responsive evaluation, the Feminist TIG connected with the International and Cross-Cultural TIG and United Nations (UN) Women to promote international feminist and gender-responsive evaluation approaches. Together, the two TIGs offered a half-day workshop on gender responsive evaluation and invited UN Women to participate. As a result, in 2011, UN Women collaborated with the AEA in a joint program to increase the number of gender-responsive evaluators. UN Women funded registration and travel awards for evaluators who had shown “leadership in and contributions to the evaluation profession or to gender-focused development in your country of practice.” As part of this collaboration, the two TIGs and UN Women jointly developed a curriculum on approaches for gender-responsive evaluation and co-managed a one-day Gender-Responsive Evaluation workshop. Although UN Women did not continue to provide bursaries for international gender-responsive evaluators, the collaboration between the two TIGs in promoting gender-responsive evaluation internationally continues. A joint workshop proposal is planned for 2013.

Progress and achievements

We consider the publication and success of the *New Directions in Evaluation* volume on Feminist Evaluation (2002) to be an important achievement of feminist evaluators. In 2011, one of our members published an article on Feminist Evaluation in a *New Directions for Evaluation* volume focused on young evaluators.

To date, the Feminist TIG has been responsible for the facilitation of many development workshops and presentations at the AEA annual conference. Initially, the number of sessions which mentioned “gender” in the title or abstract were less than those that mentioned

“feminist”. In 1998 the word gender appears twice in the program, whereas the word feminist appears 9 times. However, over the years, “gender responsive” has become a much more acceptable term and the word “feminist” has fallen out of favor. This trend has likely been influenced by the use of “gender-responsive” terms by international aid organizations.

In 2012 there were forty presentations at the AEA conference that include gender in the title or abstract. These included panels, presentations, and roundtables focusing on the following issues: health or human services; cultural context and competency; Lesbian, Gay, Bisexual, Transgender issues; social justice and/or advocacy; Feminist Evaluation or gender-based approaches; international development and evaluation; methods or evaluation framework focused; capacity building; policy; and collaborative approaches.

In 2012 there were eight sessions that mention **feminist** in the title or the abstract. These included the following:

- Feminist Issues in Evaluation Topical Interest Group Business Meeting
- Poster: Cultural Complexities and a Feminist Collective Public Health Center: Responsively Evaluating a Pilot Program for Trans Masculine Hormone Therapy
- Feminist Lens Focused on Evaluations: Revisiting Standard Evaluation Designs and Methods to Offer Tools and Strategies That Infuse Feminist Principles of Praxis into the Evaluation Process
- Complexities of Feminist Evaluation: Three Studies
- The Complex Ecology of Everyday Life: Socially Constructed Definitions, Nonverbal Cues, and Interpersonal Interactions that Perpetuate Gender Inequity and Power Asymmetry
- Roundtable Rotation I: Health Educators Becoming Evaluators: The Struggle From Within the Agency Framework
- Roundtable Rotation II: The Threat of Missing Values: The Challenges of Evaluating Older Women Landowners
- Involving Stakeholders in Evaluation: Alternative Views
- Feminist Approaches to Evaluation Research: Problems and Prospects for Enhancing Credibility and Social Justice

In addition, the Feminist Issues TIG also attempts occasionally to foster discussion on the *EvalTalk* listserv, an online discussion group focusing on participant-generated topics and questions. However, this strategy has not been terribly successful. Comments related to feminist issues have generally been attacked fairly quickly by evaluators who do not consider the topic worthy of discussion. The TIG members have in general avoided engaging with AEA members in this format, as the discussions often turn to disparaging remarks. Therefore, we regard this as an environment that is not friendly to discussion. Although we have not collected data on frequent contributors to *EvalTalk*, our experience has suggested that those participating in this format (particularly those most active in posting responses) may not be representative of the organization as a whole.

Recently, the TIG has begun contributing to the fairly new *AEA 365 tips*, a format available to all AEA members and the external community of evaluators. The format provides short, useful tips and resources for everyday practice. As of late 2012 there had been 10 entries within the AEA365 blog dealing with feminist issues and many more that included gender as part of the topic.

Key challenges

Our sessions primarily or exclusively draw professionals already interested in the topic of feminist evaluation. We struggle to engage more evaluators, those outside our inner circle, so that we are not “singing to the choir”. The sessions offered at the AEA Conferences have become more popular over the years, but we need to continue to expand our reach and articulate our relevance. Those sessions that are labeled as dealing with “gender responsive” topics are generally much more popular than those labeled as “feminist”, thus causing some reflection on the part of group members regarding the language that should be used when preparing presentations, white papers, and even proposals for evaluation projects.

Another challenge is the fact that many of those contributing to the development of Feminist Evaluation are independent contractors or have academic or professional positions that leave little time to dedicate to writing.

We have co-sponsored panels with various AEA TIGs including the International, Multi-ethnic, Lesbian, Gay Transgender, and Bisexual, Indigenous Peoples, and Quantitative TIGS in an effort to widen our conversations. These have included collaborative sessions with

the International TIG in the past that showcase the work of development professionals working in gender responsive frameworks alongside those working on feminist evaluations. How to best disseminate key ideas and values while simultaneously remaining true to our principles is an ongoing discussion.

Lessons learnt and next steps

We have learned a great deal on our journey. One of the many important lessons that we take with us is the importance of involving as many people as we can in our work. We all have busy lives and few of us have the luxury of sabbaticals or research positions with significant time dedicated to writing. It is important to share ideas and responsibilities for practical as well as strategic reasons. Through broader involvement, we also benefit from diverse ideas and increase our ability to interact with and reach diverse audiences.

Another important lesson is to encourage young and new evaluators to participate and offering them mentoring and guidance. New and young evaluators push us to think differently, to clarify our concepts, and to keep our examples and ideas fresh and relevant. We are conscious of the importance of sharing what we know and have struggled to achieve as well as the importance of continuing to learn and grow. Especially because our approach is not mainstream, finding others to carry on and continue to shape the work is critical.

One approach to involvement is to offer half day or full day workshops for beginning evaluators or for those who are new to feminist evaluation. Not only does this contribute to the quality dissemination of the model but such interaction can be energizing for all involved. Not incidentally, offering a workshop at the annual conference also reinforces the legitimacy and need for feminist evaluation.

We have also learned that, in embracing our ideals and working to create a new reality, we do not underestimate the importance of acting strategically in the current reality. Times change, leaders change, and needs demand different responses. The strategies and action once effective may lose their power and need to be replaced. Even the illusion of legitimacy does not mean that action is not needed. We must do more than grow slowly and certainly must do more than talk amongst ourselves. We need to continue to take strategic actions if we want to make our vision a reality, if we truly want to work for equity and justice.

Publishing is one of the strategic actions we have undertaken as a

means of disseminating information about how to do feminist evaluation to practitioners and students as well as encouraging others to rethink their practice. We are currently completing a volume on feminist evaluation and research that can be used by professionals and as a textbook in university classrooms; it is scheduled to be published in 2013. We hope that the volume itself, and the educational opportunities offered through its promotion, will reinvigorate and expand our efforts as well as educate new cadres of evaluators.

Our group will continue to offer workshops and presentations at AEA annual conferences.

We will continue to engage with other TIGs in cross-listed presentations and workshops.

One member is considering soliciting materials for use by instructors presenting feminist evaluation ideas in introductory evaluation, sociology, and other social science courses. We are committed to continuing to work with each other and to contributing to the development of feminist evaluation.

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INTERNATIONAL PROGRAM EVALUATION NETWORK (IPEN)

INTRODUCTION OF THE METHODOLOGY FOR GENDER AND HUMAN RIGHTS RESPONSIVE EVALUATION IN THE CIS REGION

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Background

The International Program Evaluation Network (IPEN) was established in 2000 by four NGO resource centers and one consulting company interested to develop and promote programme evaluation in the CIS region (former Soviet Union) as a full-fledged profession. (For more about IPEN see the other IPEN case study in this book.)

Evaluation was brought to the CIS region by the international aid organizations in the 1990s along with the programs of technical assistance. By the end of 1990s local evaluation capacity in the region was still very low, there were hardly any materials on evaluation in even in the most common language in the region – Russian. One of the strategies adopted by IPEN was to bring in the international expertise on all aspects of evaluation to build the capacity of local specialists interested in evaluation and to create a body of easily available materials on evaluation in Russian.

In line with this strategy IPEN was actively seeking cooperation with international organizations that had evaluation expertise. So when in 2009 the UNIFEM (now UN Women) Evaluation Unit proposed IPEN to cooperate to promote gender and human rights responsive evaluation in the CIS, this proposal was very welcome by the IPEN Board, especially because many of the Board members were representing the NGO sector and strongly believed in social equity and gender equality.

During 2010 IPEN Board and the UN Women Evaluation Unit discussed the possible approaches to cooperation. As a result of these

discussions IPEN has developed a project “Transformative Mixed Methods Evaluation in IPEN region” (TMM Project). Transformative Mixed Methods (TMM) were proposed by the UN Women Evaluation Unit as a methodological approach for gender and human rights sensitive evaluation. The UN Women Evaluation Unit also connected IPEN with the US professor Dr. Donna Mertens, the author of the transformative paradigm and TMM.

Transformative paradigm and Transformative mixed methods

The Transformative paradigm is based on the belief that evaluators should give priority to the furtherance of social justice and human rights and use community involvement and research methodologies that will lead to a greater realization of social change¹. The transformative paradigm has several definitive features²:

- It places central importance on the lives and experiences of communities that are pushed to society’s margins (e.g. women, minorities, people with disabilities, poor, non-dominant cultural groups);
- It analyses asymmetric power relationships;
- It links results of social enquiry to action;
- It uses transformative theory to develop the program theory and the evaluation approach.

The Transformative paradigm recognizes that there are multiple realities that are shaped by social, political, cultural, gender and other values. It calls for an evaluator to recognize and explore the issues of power and privilege and to determine which version of reality is privileged in a specific context. The relation between evaluator and stakeholders is interactive and stakeholders are seen as co-evaluators. Methods should be adjusted to accommodate cultural complexity. The use of qualitative methods is critical, but quantitative methods also can be used. Thus mixed methods designs usually work best to capture multiple realities.

TMM Project Model

The TMM Project was designed to ensure wide dissemination of the TMM ideas in a short period of time and to build a multi-level net-

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- 1 Mertens, D. (2009) Transformative Research and Evaluation. The Guilford Press. Page 3.
 - 2 Ibid, page 48

work of people who have knowledge on TMM. The first level of this network was formed by six members of the IPEN Board interested in TMM and committed to coordinate its dissemination in the region. The second level of the network was made of 16 evaluation specialists from 9 countries who were selected on a competitive basis to participate in a seminar in TMM delivered by Dr. Donna Mertens. These people were selected mostly on the basis of having considerable practical experience in the field of evaluation so that they could easily grasp rather advanced and complex TMM ideas. All candidates were asked to commit to conduct training on TMM in their countries.

These 22 people formed the core group that learned the TMM from the author. All participants of Dr. Donna Mertens' seminar received small grants (USD 500 each) to conduct their own training events on TMM in their countries. IPEN Board members, in addition to doing their own training events, were serving as curators to other participants of the seminar (see Fig. 1).

Based on the materials of the seminar as well as reading materials provided by Dr. Donna Mertens and the UN Women Evaluation Unit, the project developed a set of materials on TMM in Russian that was uploaded to the IPEN website and formed an on-line module on TMM³. Participants of the first TMM seminar were also asked to develop and submit cases reflecting on their use of TMM.

Figure 1. Initial two-level network of TMM specialists in the CIS region.



Unfortunately the latter component of the project did not work as planned. The TMM Project was only 6 months long, and in the case of most of the participants of the first TMM seminar they did not have enough time to apply TMM concepts in their work and get an experience to reflect on. The other reason is that most of the participants were practitioners who did not have much time to reflect on their professional experiences in writing, which is a general barrier for the development of the materials on evaluation in the IPEN region.

Case: Dissemination of TMM in Kyrgyzstan

In the Kyrgyz Republic the dissemination of TMM was championed by the National Monitoring and Evaluation Network that includes 64 organizations, mostly NGOs, and individual experts⁴. Six specialists from strong national NGOs working on gender and community development issues, all members of the network, attended the TMM seminar in Almaty, Kazakhstan. All of these six individuals had experience with doing evaluation. All of them were women.

After the seminar all participants from Kyrgyzstan had a meeting in Bishkek, the country capital. At this meeting they developed a joint plan of activities for dissemination of TMM based on their individual plans.

The first objective of this group was to spread the word about TMM. Each of the participants conducted at least two knowledge-sharing events. The events ranged from presentations to the staff of NGOs where participants worked, to open seminars for members of the National M&E Network and the Association of the Civil Society Support Centers, as well as people from academia, e.g. Yssyk Kul State University. These knowledge-sharing events took place in different regions of the country and reached over 60 people. Information about TMM was also presented at a number of workshops on gender issues. Overall response of people who participated in these events to ideas of transformative paradigm and TMM was very positive.

The second objective of the group was to apply TMM to actual evaluation. The group came up with a strategy to approach the offices of UN organizations in Bishkek and to offer them to do TMM evaluation of their small projects for free. If this happened, these evaluations

4 For more information on the National M&E Network of the Kyrgyz Republic see their case elsewhere in this book.

would be used to showcase the benefits of TMM approach to other organizations - both in Kyrgyzstan and elsewhere in the CIS region.

The group conducted information meetings with program coordinators at UN Women, UNDP and UNHCR. They presented the basics of the TMM approach and handed materials for further study. The initial response was very positive. However, even with insistent follow-up, none of the contacted agencies were able to provide opportunities to work on their evaluation using the TMM approach.

The group leader tried to talk with a head of a local consulting company that conducts evaluations. She presented the TMM approach and suggested that TMM group members either would bid with this company for some evaluation tender or would train their staff in TMM so that they use it themselves. The head of the company said that TMM was too labor-intensive, so a TMM-based proposal would never win a tender with any donor organization. So he did not see any benefit for his staff even to learn about TMM.

Still some members of the TMM group were able to apply TMM within their NGOs. For example, the transformative paradigm approach was used to develop projects of the rural women network ALGA – Forward Association of the Civil Society Support Centers, where two of the participants of TMM seminar in Almaty work. They reviewed their audit standards and changed them to incorporate transformative ideas.

Lessons Learned in the Kyrgyz Republic

- Ideas of the transformative paradigm and TMM were very positively received by the NGO community, most likely because people in the NGO sector already value social justice. People from other walks of life were more resistant.
- So far the explicit practical application of TMM was possible only in the NGO sector.

Lessons learned by the project in the Kyrgyz Republic are valid for the IPEN region in general. In other countries explicit use of TMM took place only in the NGO sector. For example, in Russia a group of NGOs working on joint standards for evaluation of projects for kids has decided to base their work on the transformative paradigm. One of the leaders of the group learned about transformative paradigm at a seminar conducted by Russian specialists who were trained by Dr. Donna Mertens.

One of the participants from Ukraine who works in an NGO in the city of Lviv explicitly used TMM to conduct an evaluation of a program for business development support run by city authorities. This evaluation was initiated by the local NGO community, not Lviv authorities, and was funded by a grant from the Ukrainian Women Foundation. The evaluation was possible because Ukraine has laws that allow NGOs to evaluate performance of any state authority. When this case study was developed, the report has just come out and there was no information on the reaction of Lviv authorities.

Several participants of the project reported that knowledge of TMM concepts changed their work even when they were unable to use them explicitly. And this helped to improve the quality of their work. For example, one of participants said that adding questions that encouraged both male and female respondents of interviews to reflect on the program-related experiences of women helped her to get a better understanding of program context and effects and often better understand the program experiences of men as well.

Overall the experience of the TMM Project reveals that the increased capacity at the “supply” side of the gender and human rights responsive evaluation does not directly lead to its practical application. Special attention and effort should be given to the development of the “demand” for this type of evaluation.

RED DE SEGUIMIENTO, EVALUACIÓN Y SISTEMATIZACIÓN EN AMÉRICA LATINA Y EL CARIBE (ReLAC)

THE LEARNING COMMUNITY FOR GENDER EQUALITY AND HUMAN RIGHTS-BASED APPROACH TO EVALUATION

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Director, Equality and Inclusion

Background

First, it is important to note that the gender equality and human rights-based approach to evaluation has recently become more visible in a formal way. It is a process in progress that highlights substantive and timely aspects of the evaluation processes which the evaluation community in Latin America and the Caribbean have been thinking about for some time through our own practice.

We are a region where the indigenous and Afro descendant presence and the networks and civil society organizations – articulated around poverty, exclusion and discrimination – are some of our main characteristics. Therefore, what the historically excluded groups and communities can find in a gender equality and human rights-based approach to evaluation is a space where they can have their voices heard.¹ This poses both value and a challenge: the relevance of this approach as a space for visibility for the recognition of the difference and for the inclusion of the historically excluded groups.

Another antecedent of this case, which was its source and initial impulse, is the panel *“Advances in the evaluation with a gender equity approach: Views from UN Women, Civil Society and Universities”* held in the context of the International Congress on Evaluation

1 We can attest, from our longstanding relationship with indigenous and afro descendant woman leaders in the region, that they manifest their need to be considered, consulted in assessments and to be able to express their own views and judgments on the outcomes and impacts of various projects of development in their communities.

and the III Conference of the ReLAC in July 2010, whose discussion generated widespread interest among a large number of participants in continuing to deepen the scope of the matter.² At the end of the panel, a group of 23 people from various origins enrolled in a list aimed to create a working group within the ReLAC.

Similarly, in 2011, on the occasion of the “Seminar on Evaluation with a Gender Equality and Human Rights-Based Approach: Measuring or Changing Reality?”, which was organized jointly by UN Women and the Equity and Inclusion Consultancy and included the participation of several experts from the ReLAC³ and other institutions, experiences and reflections were shared on various issues related to this approach and the need for a reflective space on the conceptual and methodological scope of this new evaluation approach was emphasized.

In this context, the need to share experiences and learned lessons on evaluation is an opportunity for the region, especially from the momentum created by new approaches, the progressive implementation of transparency and accountability policies, the creation of new public agencies of evaluation and the growing importance of social networks, which have given a new impetus to the creation of spaces for systematic exchange in various fields of development.

Thus, these identified elements and probably others we have omitted began to open coordination paths – with different nuances and emphases – to set up a progressive and constructive process on the issues of a gender equity and human rights-based approach to evaluation in Latin America and the Caribbean which requires rethinking capacity-building in these areas from peer exchanges. Everything indicates that we are in a creative process of reflection and construction of a conceptual and methodological heritage that is taking its first steps and needs to be shared and discussed collectively.

In this framework, we present the case of the Learning Community of the ReLAC called “Evaluation group on gender and human rights”, which aims to promote the creation of collective knowledge from reflection and shared learning.

2 Belén Sanz, Head of the Evaluation Office of UN Women, Carmen Colazo, Network Coordinator of Gender and COLAM Development and Alejandra Faúndez, Director of Equity and Inclusion Consultancy, participated in this panel.

3 The Seminar was held in Quito, Ecuador, on February 7-8, 2011, with the presence of 61 experts on evaluation, gender and human rights from the region, Spain, and the United States.

How does this learning community operate?

In terms of its composition, the Group brings together participants from civil society, governments and international agencies which include monitoring and evaluation specialists, advocates in the field of gender equality and human rights, many of whom promote and/or support programmes in the region related to these areas of work.

To date, it consists of 111 registered people – the second largest group in ReLAC in terms of adherence – whose membership is voluntary and whose work is based on a collectively defined agenda with a central theme over successive periods.

The work methodology is an interactive articulation between theory and practice, whose basis is that those people who work in institutional or similar thematic contexts develop a common practice, thus creating the possibility of sharing their skills and knowledge and, in this process, we also learn as we form a community of practice or learning.

For its operation, the intensive use of new information technologies through the virtual platform on which the Network runs (News ReLAC: <http://noticiasrelac.ning.com/>) has been considered in three closely related purposes:

- As a tool to facilitate exchange and communication among its members;
- As an instrument to promote and facilitate collective and individual learning;
- As a tool for remote collaborative production (specific dialogue reports, notices, among other coordinated initiatives).

What activities has the Group achieved thus far?

We can differentiate various stages in its activities:

Phase 1: Defining the group's interests

- In this early stage, a coordination team of the Community was established, consisting of 3 professionals whose role is to energize, call meetings for the forums and spread information.

- Between August and September 2011, a survey of interests was conducted taking advantage of the possibilities provided by on-line surveys, and that information was used to highlight some specific points of the agenda for the Group's operations in the months ahead.
- The primary concerns expressed in the survey were: the transfer and/or discussion of the fundamental elements of the gender equality and human rights approach to evaluation, with special emphasis on its practical or operational aspects (methodological issues, skills, design, diffusion), which is understandable since many participants come from the monitoring and evaluation field where this perspective of evaluation is in its early stages. Moreover, the demand for practical elements has turned out to be very pertinent considering the overall profile of the participants, oriented towards technical support and/or the implementation of programmes that consider these approaches. Lastly, the assessment of political elements of evaluation related to stakeholder participation, empowerment and social transformation is also important. Similarly, the conversations that arose at the beginning of the forum focused on issues such as the situation of rural life as well as indigenous women in relation to the gender equality and human rights-based approach.
- In terms of modalities of participation, the prioritized proposals were: to participate in discussion forums, seminars and other online initiatives; to share evaluation experiences related to gender assessment and human rights; to share methodological and conceptual scopes related to the gender equality and human rights-based approach to evaluation; to upload contents to the Group site; to upload links to the Group site; to upload information on requests for bids and jobs associated with the topic.

Phase 2: First discussion forum on "A Gender equality and human rights approach to evaluation"

- This forum was organized during the month of September 2011, and had 270 views as well as 19 interventions that boosted the various topics related to the activity between September and October.



- The forum ended with a Synthesis Technical Note on Group discussions, prepared and delivered in the month of October 2011.
- The main topics of the forum were: the importance of the interaction between gender/race/ethnicity/age and area of residence in Latin America and the Caribbean; the use and dissemination of evaluation results among stakeholders; the emphasis of evaluation in the learning process; the scope of the concept of gender; the importance of participatory methodologies in evaluation; the role of the evaluator; the value of the strategic, multidimensional and involved nature of this new approach.

Phase 3: Sharing documents around the approach and second Discussion forum

- In early 2012, documentation was exchanged and a set of documents about the gender equality and human rights-based approach was uploaded in the platform. These documents addressed conceptual and methodological issues requested by the participants in the previous months of exchanges.⁴
- On occasion of the reading of the materials, the second Discussion Forum “Scope of the document on the Systematization of Evaluations” was convened. This forum had 150 views and 16 responses that brought life to the debate. The publication discussed is available at: <http://www.inclusionyequidad.org>



4 The manual “Let’s take the floor” (Basagoiti, 2001) which provides the guidelines for promoting participatory research; Text “80 Tools for participatory development” by Frans Geilfus (IICA, 2009) which provides a broad overview on the world of participatory techniques; Evaluation Text, Process Guide from the Local Observatory of Participatory Democracy (2006) which provides a number of particularities for evaluating participatory processes; Text by Iñigo Estolaza on the Theory of Change (UNDP, 2006) where by the author provides guidance on this way of approaching the project cycle; Participatory Program Evaluation Manual (Judi Aibel, 2000) provides conceptual and practical tools for organizing participatory evaluation processes; Manual on the Technique of Mapping Outcomes (2002) which provides a detailed introduction to the comprehension and use of this technique; Texts by Algreto Ghiso: “Empowering diversity” and “Systematization of experiences”, whereby he develops the notion of systematization as a dialogue of knowledge and explores the implications of a reflective and participatory proposal of research; The summary of the study’s presentation “Evaluation with a gender equality and human rights-based approach”. Systematization of practice in Latin America and the Caribbean (Abarca and Faundez, 2011), a document that offers a look into a set of assessments and revised guidelines.

- The main topics of the forum were related to the following questions: a) Are the factors related to the context of the emerging approach sufficiently entrenched in the region? b) What innovative changes in the use of methodologies can be observed in the assessments? And in its own practice? c) What is your opinion on the role of the actors in the programme during the evaluation process?; and d) How has our own experience been in relation to the how, why and for whom of the evaluation?
- This forum ended with a summary note highlighting interesting issues ranging, for instance, from the concept of gender and the inclusion of masculinities to reflections on the role of evaluations in the context of unequal power relations and the need to articulate new analytical categories, among other things.

Phase 4: The overlook on public policies and incidence

- The debate agenda for this coming period is currently under preparation. These are some of the emerging issues: the implementation of evaluative agencies in the governments of the region and how these processes establish a dialogue with the gender equality and human rights-based approach, the incidence towards them and towards cooperation, further understanding of some methodological precisions on approach, among other things. The main topics of debate for this period still need to be defined.
- At the same time, participants have requested and shared documentation of various kinds having to do with approach, gender and migration, and evaluation and cooperation for development.

Challenges

- As noted, the Group offers a contribution for its potentialities in proposing and encouraging an emerging agenda whereby various institutional interests exist. Therefore, a political and institutional effort is needed to coordinate agendas and times that will allow for the increased potential of the meetings. At this point, it is important to improve our ties with the ReLAC, with other sites like PREVAL, the REDLACME, the site created by UNDP Regional on evaluation, and other sites of the UN agencies. This is key for promoting agreements on distribution issues and initiatives, and creating synergies that increase participation in various spaces. The current overlapping of sites disempowers the whole.

- To define a substantial, basic bibliography that can allow for a number of reduced topics of discussion to be shared at each event. The dispatch of targeted documentation and promotion of high-level discussions to harmonize themes and titles may be conducive in this direction.
- To conduct an institutional effort so that in-person meetings of various networks (e.g., the next Regional ReLAC Conference) can generate spaces of face-to-face interaction between members of the Group and thus enhance synergy.
- To incorporate a line of Technical Notes concerning various topics of the approach, along with other working groups of the ReLAC. Its periodicity may be bimonthly or biannual and aim at political-theoretical and methodological points.
- To create new spaces for the exchange of experiences, much like a bank of good practices in the region about gender equality and human rights in evaluation.
- To try to increase the platform's level of interactivity in order to encourage exchanges and seek its members' participation. This point has to do with two major issues: a) the limitations of the ReLAC News Site in the sense that its interface does not allow for the development of webinars, chats or other 'live' events that enable a higher level of interactivity between participants. This condition can serve as a barrier towards generating a more proactive engagement in those who tend to use more synchronous methods of communication, and b) the role of coordination requires ongoing support and it is very important in terms of energizing the Group, but at the same time requires support whether it is financial or sharing responsibilities due to the intense amount of time that animation demands for some of the people who coordinate the groups.

Assessing the experience

- a) The strategic objectives for creating a Learning Community have given way to the promotion of an interesting partnership between different actors. From the coordination aspect, which consists of an Evaluation Office of the United Nation's System (UN Women) associated with an organization of professionals (Inclusion and Equity Consultancy) and all of them articulated around the ReLAC itself, to the participation, at the same time, of a large number of professionals and activists from the field

of development belonging to the State, the Civil Society and international cooperation organizations from 18 countries of the region. Thus, the articulation itself is a valuable exchange opportunity and a space of resonance for technical discussions and policies in vogue in the region, in synergy with the efforts of other entities such as UNEG and UNDP, among others.

- b) The assessment of an institutional affiliation is interesting. Most of the participants of the Group belong to institutions (80%), and over 50% are tied to agencies of the United Nations System at regional level. It is important to note that this also implies a more passive way of participation, that is, that most of the participants limit themselves to visiting the platform but do not necessarily express their opinion in the forums. It is mainly those linked to Civil Society Organizations who encourage the important debate that has developed in this period.
- c) The ReLAC News site has been fundamental in the Group's articulation. It is designed around three basic, yet necessary operations for its proper functioning: activate a membership, participate in opinion forums and exchange documents and news.
- d) Regarding the contents that have been elaborated in the forums and in the ReLAC's Conference Panel as well as in the experts' Seminar, all of which was present when the group began, some very important elements are worth noting:
 - The need to bring the practice of evaluation back to its fundamental aspects, that is, the construction of learning and optimal decision-making for greater impact on public policies and developmental programmes. Concerning this point, the representatives of female organizations warned about the fact that evaluative terminology can sometimes be imposed upon the actors without serious reflection on its reach, reducing the evaluative work process to its procedural dimension, in terms of the fulfilment of a commitment made with the donors and that, from this approach, its main transforming capital is not very easy to avoid, and thus there is a potential lacuna.
 - The need to synchronize the implementation and/or operation of systems and evaluative practices with the times of the programmatic intervention and political action has been highlighted, seeking to incorporate them from the beginning – if possible, at the design stage of the programmes –and with

full knowledge and participation of all interested stakeholders, in order that the participatory component of the evaluations is not only rhetorical.

- The importance of recovering the evaluation as a social good in terms of its importance towards achieving the impacts or changes that are expected to be reached. From this point of view, the evaluative exercise is demanded to satisfy conditions of inclusion, participation, responsiveness or relevance and ownership by local actors, many of which are in a situation of vulnerability and/or exclusion. This involves attaching a provision of time, cultural relevance and institutional relevance appropriate throughout the entire evaluation process.
- To recognize the importance of incorporating an overview and a logic of evaluation that emphasizes the dimension of processes with regard both to the construction of learning about the intervention and the achievement of expected impacts, an issue that introduces a long-term dimension and complexity in terms of the exercise of the attribution of impacts to the specific intervention when it is in fact operated within a multifactorial context whereby it is difficult to talk of monocausality.
- Derived from the above, as an approach to the evaluative judgment, the need to incorporate new appreciative models that value the qualitative dimensions and integrate them with the quantitative ones has been raised, thus seeking to enrich the contextual information (local, cultural, political, social) and thus reflect the issue of results and impacts in a complex or multicausal way.
- It has also been considered that the introduction of a gender equality and human rights approach to evaluation demands the incorporation of a systematic capacity-building programme. Materials or guidance on specific issues of the approach ranging from its design and management to the conceptual and methodological aspects have been permanently demanded in ReLAC's own Group; thus, there is an enabling scenario for amplifying the number of professionals who know it and integrate it to their evaluative practice.
- Important issues have been discussed from the perspective of gender equity, such as the distinction of equity/equality at the approach level, and the challenges and questions posed by the incorporation of men and other diversities,

both at a gender analysis level prior to the project as well as the reflection on the differential impact of interventions. An underlying theme that evaluative reflection cannot escape is the equality/difference dialectic, especially when trying to work from an inclusive and mobilizing perspective.

- Finally, another point raised was the need to move forward from the evaluation of programmes towards the evaluation of public policies with a rights-based approach, implying a leap in terms of complexity and advocacy. From the point of view of the approach, this raises the need to have an impact on national evaluation systems and, at the same time, strengthen the capacities of the stakeholders at a governmental and civil society level in order to bring about evaluative processes at any level that may be required. This requires creating distinctions between evaluations whose axis is based on economic development from those evaluations whose axis is based on human rights.



Annex

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AUTHOR VITÆ



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DE SILVA, Soma, is a former UNICEF South Asia Regional Monitoring and Evaluation Officer. She was a founder member and two times past President of the Sri Lanka Evaluation Association (SLEvA) and recently President of the International Organisation for Collaboration in Evaluation (IOCE) and Co-Chair of EvalPartners. She has ini-

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These include approximately 100 members, namely NGOs, local governments and hospital centres, all conducting international solidarity, decentralised cooperation or inter-hospital activities. Before that, he worked during seven years for different French NGOs (Groupe de Recherche et de Réalisation pour le Développement Rural, Handicap International, ...) in different fields (rural development, education, food security, water sanitation, microfinance, HIV ...), countries (Mali, Senegal, Morocco, Lebanon, Laos, ...) and functions (director, coordinator, trainer, consultant in evaluation and feasibility studies, ...). He is also member of the French Society of Evaluation (SFE).



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ELIADIS, Maria, is Executive Officer, Australasian Evaluation Society Inc. (AES) Maria has two distinct and complimentary areas of expertise social policy, research, and evaluation, as well as development and management of education and training businesses. Maria holds an Honours (1983)

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FAÚNDEZ, Alejandra, has been a teacher, researcher and consultant on issues of gender equality, evaluation, participation, social indicators and inclusive public policies for over 20 years. A specialist for various international organizations and the United Nations in several of the region's countries. A regional and national programmes evaluator. Member of the Monitoring, Evaluation and Systematization Network of Latin America and the Caribbean (ReLAC)

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ing, capacity building and, institution building. Areas of his special interest include: dynamics of population change, population and healthcare management, rural and urban healthcare, sanitation, ageing, disability, gender, social development and related issues. He holds a Ph.D. in Social Demography, a Post Graduate Diploma in Population Sciences and, a Master's Degree in Statistics. He has over 35 years of research, teaching and training experience. In the past, he has worked with Punjab University, Chandigarh and, Institute of Health Management Research, Jaipur. He has also closely worked with WHO, UNFPA, UNICEF, USAID, DFID, PATH and many other international and national organisations. He has over 100 research papers and reports to his credit. He is actively associated with several international and national professional organisations.



HANIK, Umi, is currently conducting the mid-term evaluation of 5-years national development planning in Indonesia under the project of Decentralization as Contribution to Good Governance (DeCGG) of the GIZ (German Development Cooperation). She has been working as an M&E specialist and expert at various national projects in

Indonesia funded by UNICEF, the World Bank, UNDP, the European Union, GIZ, CIDA, AusAID, DPR RI (National Parliamentary House), and Bappenas (Ministry of Planning) since 2002. Most of her work has been in the area on M&E and public finance. She has been involved in major contributions in the development of National Performance-Based Budgeting (PBB) component system and state finance policy. Umi was the Indonesia co-writer for the Paris Declaration Phase 2 Evaluation, which received the Outstanding Evaluation Award from American Evaluation Association 2012. She was a Founding member of the Indonesian Development Evaluation Community (InDEC).



HOPWOOD, Ian, is a development consultant and teaches at the University of Dakar. He was formerly UNICEF Representative in Senegal and was previously Chief of Evaluation at UNICEF HQ (1997-2000). He has degrees from the University of Aberystwyth and Cornell. He has been an active member of SenEval since its earliest days.



JOPPERT, Marcia Paterno, graduated in Civil Engineering from the Polytechnic School, University of São Paulo, Brazil, in 1987. She earned an executive MBA from the ARCADIS Advanced Management Program, TSM Business School Netherlands, in 2000. She also earned a Master's degree in Administration and Public Policy from the University Institute of Lisbon in 2010. Marcia Paterno Joppert has twenty-four years' experience in planning, managing, monitoring and evaluating programs, projects and ventures, most of them for the public sector. Since 2008 she has worked in some short-term consultancies and, in partnership with Publix Institute, leading some short-term courses in M&E. She has been the General Director of the Brazilian Evaluation Agency since 2009, and member of the Steering Committee of the Brazilian Monitoring and Evaluation Network, a member of the executive committee of ReLAC, Board Member of IOCE since January 2011, and a member of AEA.



KAABUNGA, Enid, is a Monitoring and Evaluation Specialist based in East Africa. She has conducted evaluations, designed and implemented monitoring systems and trained development practitioners for various projects and programmes in Africa. Her main area of focus is health interventions that are targeted at the youth, displaced populations and health workers. Enid has a Master's degree in Public Health, specializing in Health measurement from the University of Pretoria, South Africa. She is a member of the Evaluation Society of Kenya (ESK), the African Evaluation Association (AfrEA), the International Development Evaluation Association (IDEAS) and is the current Chair of the Africa Gender and Development Evaluators Network (AGDEN).



KALIMULLAH, Nazmul Ahsan, is currently a Professor in the Department of Public Administration, University of Dhaka, Bangladesh. He is the founder and Chairman of JANIPOP (National Election Observation Council), Bangladesh. He has a Ph.D. and Post-doctoral research experience from the universities of Birmingham and

Bath in the United Kingdom. He has published 60 research articles and books on NGOs, international development and tourism management. Professor Kalimullah is the President of BEN (Bangladesh Evaluation Network). He is a life member of Sri Lankan Evaluation Association, (SLEvA) and is a member of Community of Evaluators (CoE), American Evaluation Association (AEA). He is involved in evaluation and monitoring for nearly three decades. Moreover, Professor Kalimullah is involved in election monitoring and assessment. He has been observed and assessed elections in the USA, UK, Egypt, Mozambique, Zambia, Nigeria, Pakistan, Sri Lanka, Nepal, Hong Kong, Timor-Leste and Bangladesh.



KINDA, Oussen, is an economist working on issues of sustainable development with a focus on M&E. He is currently an intern with ENDA, a leading NGO in Burkina Faso. His interests are the evaluation of climate change adaptation initiatives and development evaluation in general. He has a Master's degree in economics from the

University of Ouagadougou and a Masters in Development Practice from Cheikh Anta Diop University, Dakar.



KOSHELEVA, Natalia, has been working in the field of evaluation since 1996. She has conducted evaluations in the former CIS countries and Eastern Europe both for national and international organizations including UNDP, UNICEF and USAID. She also has experience in the field of program and project design and management,

including design and management of M&E systems. She co-edited the book *"Program Evaluation: Methodology and Practice"* (in Russian) (2009). Natalia is a graduate of the Moscow State University, Russia, and also Indiana University, USA. Member of International Program Evaluation Network (IPEN) since 2006, member of American Evaluation Association (AEA) since 2007. IPEN representative to IOCE since 2011, and currently Chair of IPEN and IOCE, and Co-Chair of EvalPartners.



KOUAKOU, Samuel, is currently the Assistant Director of Evaluation and Projects Sustainability in the Directorate of Evaluation and Projects Control of the Ministry of Agriculture, Côte d'Ivoire. He is in charge of Monitoring, Evaluation and Coordination of bilateral and multilateral development projects and programs. He participated in

many supervision missions with international funding agencies and conducted several external evaluations. Mr. Kouakou holds a Master's degree in Rural Engineering, Post-Graduate certificates in Project management, Monitoring and Evaluation, Integrated Water Resources Management as well as Gender Mainstreaming. He is a member of several monitoring and evaluation networks such as EES, IDEAS, AfrEA and RISE. He teaches at the E-education Center of the International Institute of Water and Environmental Engineering (2IE), Ouagadougou (Burkina Faso). Mr. Kouakou is E-learning tutor, certified by the Agence Universitaire de la Francophonie (AUF), the Association of Universities of the Francophonie.



KUMAR, Shiv, has over 19 years of experience and accomplishments in social development in India and internationally. He has founded several organisations within the Catalyst Group – Catalyst Management Services, a consulting firm; and two not for profit organisations, Swasti – health resource centre and Vrutti – a livelihood resource centre.

Shiv's experience spans consulting, research, capacity building and implementation of development initiatives. He brings innovative perspectives to address challenges of the development sector, particularly through technology. He has helped countries and organisations successfully raise funds and apply them well. He serves on the boards of a number of NGOs and business enterprises and in India on several national level task forces and technical resource groups. He has travelled and worked internationally in over 20 countries.



KUMAR-RANGE, Shubh K., is currently working as a policy analyst and evaluator. She has worked on a wide range of poverty reduction, food and nutrition security, agricultural development, and women and children related programs and policies over three decades. Specialized in strategic and policy analysis, she has published numerous

research papers, book chapters, edited a conference volume for World Development, and served as referee for many journals. Sev-

eral of her research papers have been used as reference material in university courses, including at the Kennedy School, Harvard University. She has worked internationally and for the past 10 years is now based in India. She is a founder member of the Community of Evaluators (CoE/South Asia) and is active in supporting the development of this group, and especially in promoting evaluation research and publishing.



LOMEÑA-GELIS, Mònica, is M&E Officer at the Regional Office of the UN Capital Development Fund, and also doing her Ph.D. research on “meta-evaluation of local climate change initiatives in Senegal”. She holds a degree in Environmental Sciences (Autonomous University of Barcelona) and a Masters in International Development and Environment (University of East Anglia). She has been a

Country coordinator for an NGO in Bolivia and a Research Fellow in the Inter-American Development Bank’s Evaluation Office. She is the knowledge management focal point of SenEval, the Senegalese Evaluation Association.



LUCKS, Dorothy, a member of the Australasian Evaluation Society (AES) Strategic Engagement and Professional Development Committees. She has over 20 years’ experience in project, programme, country and thematic evaluations. She has worked for various United Nations agencies, the World Bank and Asian Development Bank as

a management and evaluation specialist. She has a Doctorate in Sustainable Development, Masters in Business – International Development, post-graduate in entrepreneurship and Bachelor of Science degree in genetics and behaviour. She is a member of other Boards in addition to that of AES. Dorothy has been the author of a number of studies addressing key issues such as homelessness, inequity and exclusion, poverty and rural development. She believes strongly in the benefits of a strategic, analytical and innovative approach to capacity development for the evaluation sector, VOPEs and for their members.



MARKIEWICZ, Anne, Vice President of the Australasian Evaluation Society (AES) is an evaluation consultant who has undertaken a wide variety of contracts with both government and non-government sectors, focused particularly in areas of developing monitoring and evaluation frameworks and program evaluation. She delivers formal training

extensively on the topic of 'Developing Monitoring and Evaluation Frameworks' and has provided such training in Australia, New Zealand, Papua New Guinea and the United Kingdom. Anne has been involved on the AES Board for 6 years and during that time has assisted the organization to develop its 10 year Strategic Plan (2010-2020) and to begin to implement that plan. She has also assisted the AES to transition to an organizational structure that can support its strategic objectives. Anne is a current member of the AES, the AEA and the PNG AoPE.



MCGUIRE, Martha, is a Credentialed Evaluator with almost 25 years of experience in evaluation. She established Cathexis Consulting, an evaluation consulting firm, in 2001. She is recognized for her strong evaluation design skills, her ability to manage evaluation projects and her keen interest in the development of evaluation as a profession.

She was actively involved in the development of the Professional Designation Program with the Canadian Evaluation Society and continues her involvement as Past President of CES and as a member of the IOCE board.



MCKEGG, Kate, is an independent evaluator, company director (The Knowledge Institute Ltd) and member of the Kinnect Group (www.kinnect.co.nz). Much of her recent evaluation work is focused on supporting government and non-government organisations build evaluative capacity, frameworks and systems. Her evaluation work

has been cross sectoral and cross cultural, ranging across Philanthropy, Environment, Health, Mental Health, Disability, Education, Maori Development, Social Development and Sport and Recreation. Kate is also a pragmatic academic, with substantive experience developing and implementing teaching programmes in evaluation at post graduate and under graduate levels for several New Zealand universities. Kate is a founding member of the Aotearoa New Zealand Evaluation Association (anzea), serving as a board member

from 2006-2010, and Convenor from 2008-2010 and is once again anzaa Convenor for the period 2012-2014.



MIHALACHE, Roxana, serves as the founding chairperson of the Romanian Evaluation Association (EvalRom) since 2006, and she also served on the board of the European Evaluation Society (EES) between 2006-2009. Roxana is the managing partner of a small Romanian consultancy in evaluation (Pluriconsult Ltd.) and has been practicing program and project evaluation (mainly in the social and education domains) for about 15 years. Roxana holds a MA in social psychology and a PhD in sociology (with a topic on evaluation of social programs in Romania).



MUTUA, Jennifer, is M&E Officer for African Women Educationalists (FAWE) and UNDP /Monitoring & Evaluation Directorate (MED)-Ministry of Planning, Kenya. She holds a Bachelor's Degree in Sociology and Philosophy from the University of Nairobi. Jennifer's professional M&E Training includes International Programme for Development Evaluation Training (IPDET), Carlton University; Governing for Development, University of Antwerp, Belgium and Participatory Planning M&E, Wageningen University, Netherlands. She is the current chair and founding member, Evaluation Society of Kenya (ESK); Board member of the African Evaluation Association (AfrEA) representing Eastern Africa; Member of the International Development Evaluation Associations (IDEAS); European Evaluation Society (EES) and the South African Monitoring & Evaluation Association (SAMEA).



MWANZIA MATHUVA, James, has a Master's degree in Economics from the University of Nairobi. He has worked as an Economist in the Public Sector for the last 23 years (since January 1990). For the period January 2001 to December 2004, worked for the National AIDS Control Council (NACC) as a Provincial AIDS Control Coordinator. He is currently a Chief Economist for the Ministry of Local Government heading the Central Planning and Project Monitoring Unit (CPPMU). He coordinates all planning and M&E-work for the ministry including representing them in Donor/ Government policy/ strategy meetings. He is a member of the M&E National

Steering Committee (NSC). He is a founder member and leader of the Evaluation Society of Kenya (ESK). He is the Chair of Far Vision Investment Company, Kutetheanisia SHG, and Connecting Group Leader of International Christian Centre – Syokimau Group.



NGABINA, Guennolet Boumas, is currently M&E Officer at Heifer International Senegal an international NGO focusing on sustainable development through food security and social capital. He earlier worked in project design and M&E for World Vision. He holds Masters' Degrees in Development Practice and in Economic Policy from Cheikh Anta Diop University, Dakar. His interests are food security and sustainable livelihoods, livestock improvement and development evaluation. He helped organize SenEval training workshops during 2012.



NORGAH, Samuel, is Regional Head of Strategy, Plan International (Eastern & Southern Africa); responsible for supporting the development of Country & Thematic Strategies across 12 countries. He is member of the Canadian Evaluation Society (CES), and AfrEA, as well as the Evaluation Society of Kenya (ESK).



NYANGANGA, Julius, is the Regional Monitoring, Evaluation and Learning Manager for the International Institute of Rural Reconstruction (IIRR) in Nairobi, Kenya. Before coming to IIRR Julius was a Capacity Development Officer and before that a Research Associate with the Innovation Works (IW) initiative at the International Livestock Research Institute (ILRI). Julius' main capacity is to linking knowledge with action through various aspects of project planning, implementation, monitoring and evaluation. His particular activities entail training in M & E in general, and Outcome Mapping in particular, and integrating the methodology's qualitative approach in program management. Julius has also worked as an extension official at various levels of the Ministries of Agriculture and Livestock, Kenya. He has an MSc in Animal Nutrition, BSc in Animal Science, and is an MBA student specializing in Strategic Management. He is a member of the Evaluation Society of Kenya (ESK).



PATTANAYAK, Sandip, has over 15 years of working experience with NGOs, Government and Consulting Organisations at national and international levels. He has expertise in livelihoods development, natural resources management, agriculture and water and sanitation. He has specialist skills in monitoring and evaluation, review and impact assessment and capacity building. In addition he has experience in the field of waste land development, micro-credit, medium and small enterprise development, disaster risk reduction and education. Sandip is a qualitative research expert with sound understanding of quantitative designs and research methodologies. He has good understanding of Results Based Management Systems (RBMS), Logical Framework Approach (LFA) and Outcome Mapping (OM). He has reviewed, facilitated and formulated M&E systems, based on the above principles, for several organisations and programmes. Sandip can design and implement monitoring, evaluation and learning systems for large projects and programmes and can carry out programme evaluations. He can also train people on the use of the above approaches. He is a member of the CoE/ South Asia Strategic Advisory Team (SAT).



RODRÍGUEZ-BILELLA, Pablo, is a consulting sociologist, with more than 15 years of progressively more responsible positions in applied and academic social sciences. These include evaluation, planning, community participation, and program management. He has been board member of ReLAC (the Latin-American Network of Evaluation) and IOCE (the International Organization for Cooperation in Evaluation), and he is a member of the Board of IDEAS (International Development Evaluation Association). He is a lecturer of Social Anthropology at the Universidad Nacional de San Juan, and researcher at the National Research Council of Science and Technology (CONICET), both in Argentina. Pablo blogs about development, evaluation, and complexity at <http://albordedelcaos.com>.



RUGH, Jim, has been professionally involved for 49 years in rural community development in Africa, Asia, Appalachia and other parts of the world. For the past 33 years he has specialized in international program evaluation. He served as head of Design, Monitoring and Evaluation for Accountability and Learning for CARE Interna-

tional for 12 years, responsible for promoting strategies for enhanced evaluation capacity throughout that world-wide organization. He is recognized as a leader in the international evaluation profession. From 2008-2011 he served as the AEA (American Evaluation Association) Representative to the IOCE (International Organization for Cooperation in Evaluation), the global umbrella of national and regional professional evaluation associations, where, as Vice President, he was an active member of the Executive Committee. He is now working with UNICEF and IOCE to coordinate the Eval-Partners Initiative that aims to strengthen evaluation capacities of and through Voluntary Organizations for Professional Evaluation (VOPEs) around the world. Jim co-authored the popular and practical *RealWorld Evaluation* book (1st edition 2006; 2nd edition published by Sage 2012, see www.RealWorldEvaluation.org). For 26 years he has been actively involved in AEA's International and Cross-Cultural Evaluation Topical Interest Group, and was the founder of InterAction's Evaluation Interest Group. In recognition of his contributions to the evaluation profession he was awarded the 2010 Alva and Gunnar Myrdal Practice Award by AEA.



SAMB, Ndeye Fatou Diop, is a project management consultant, specialising in M&E and women's entrepreneurship. She was programme coordinator in "Eau Vive" and "Pasteef" NGOs, 2002-2008, and a Manager of "Baol Construction" company (2008-2010). She holds a Master's in Project Management and Business from the African Centre for Higher

Management Studies (CESAG) and a degree in Organization and Management from the National School for Applied Economics (ENEA). She is the Treasurer of the Senegalese Evaluation Association (SenEval).



SAUNDERS, Murray, is Director of the HERE Centre (Higher Education Research and Evaluation), in the Department of Educational Research, Lancaster University, and Professor of Evaluation in Education and Work. Murray has acted as a consultant to, and undertaken a wide range of evaluation projects for, the British Council, DfES [Department for Education and Skills], DFID [Department for International Development], ESRC [The Education and Social Research Council], HEFCE [Higher Education Funding Council], the UNRWA and a variety of regional agencies. Murray has carried out evaluation and research projects in a wide range of cultural contexts, including in

Asia: China, Japan, Singapore and India; in Africa: Tanzania, Kenya,

Nigeria, Ghana and Ethiopia; in Latin America: Mexico and Chile; In the Middle East: Jordan as well as other member states of the EU and Russia. Murray is involved in promoting and developing evaluation practice as past President and Council member of the UK Evaluation Society, Board member and immediate past president of the European Evaluation Society (EES), chair of the co-ordinating committee for the establishment of the IOCE [International Organisation for Cooperation in Evaluation] and currently Vice President of the IOCE. He is associate editor of the only international multidisciplinary academic journal in the European context – *Evaluation*.



SEGONE, Marco, is responsible for the Decentralized Evaluation function as well as the National Evaluation Capacity Development portfolios at the UNICEF Evaluation Office. He is Co-Chair of the UNEG Task Force on National Evaluation Capacities since 2009, and now Co-Chair of EvalPartners. Previously, he was Regional Chief,

Monitoring and Evaluation in the UNICEF Regional Office for Central and Eastern Europe and the Commonwealth of Independent States (CEE/CIS), Author Vitæ during which he represented UNICEF on the Board of Trustees of the International Programme Evaluation Network (IPEN). During his 22 years in international development, he worked in Bangladesh, Pakistan, Thailand, Uganda and Albania in integrated development projects. In 1996 he joined UNICEF to work for the UNICEF Regional Office for Latin America and the Caribbean; UNICEF Niger, where he founded and for two years coordinated the Niger M&E Network (ReNSE); UNICEF Brazil, where he was one of the founders and coordinator of the Brazilian Evaluation Network. In 2003 he was elected Vice-President of IOCE and was one of the founders of the Latin America and the Caribbean Network for Monitoring, Evaluation and Systematization (ReLAC). Segone has authored and/or edited several books and articles, including *Evaluation for equitable development results; How to design and manage Equity-focused evaluations; From policies to results; Country-led M&E systems; Bridging the gap. The role of M&E in evidence-based policy making; New trends in development evaluation; Creating and developing evaluation organizations; and Democratic evaluation*. In recognition of his contributions to the evaluation profession he was awarded the 2012 Alva and Gunnar Myrdal Practice Award by AEA.



SEIGART, Denise, is Associate Dean for Nursing Education at Stevenson University. She has a long standing interest in feminist approaches to evaluation and school-based health care, and has served in various roles over the years on the Feminist Issues Topical Interest Group of the American Evaluation Association (AEA). She lives

with her husband and two large dogs in Baltimore.



SOW, Moctar, is President of the Association Sénégalaise d'Évaluation (SenEval) and member of the planning committee of the Francophone Evaluation Network. Associate Director of IFE Consult specialized in the evaluation of public policy, he has undertaken numerous evaluations of policies and programmes in Senegal and beyond.

He also teaches evaluation at the National School of Administration and the CIFOPE Institute, Paris.



STEPANTORO, Benedictus Dwiagrus, has been working in the development field since 1998, in government, private, bilateral and multilateral organisations, with a focus on urban and regional planning, policy and social development programs. He completed a master's degree in urban management focusing on assessment of institutional

capacity for public land development. Dwiagrus' focus on M&E started in 2007 with implementation of an M&E system of a health system strengthening project in Indonesia. Since 2010 Dwiagrus has been implementing an Evaluation Capacity Building Program for AusAID's Indonesia Program. He is the current Chair/President of InDEC (Indonesian Development Evaluation Community).



TRAORÉ, Issaka Herman, has over 17 years of experience in M&E of development projects, designing M&E systems, participatory rural appraisal, and supporting project preparation and implementation in diverse fields (Agriculture, Natural Resource Management, Democracy & Governance, Food Security, Alternative Energy, Mining,

Micro-Finance, Education, etc.). In 2003 he completed his studies in International Development at the Kimmage Development Studies Centre in Dublin, Ireland, attaining upper second class honours in the academically rigorous National Diploma programme

(Irish B.A equivalent). Mr. Traoré played a lead role in AfrEA as a Board member from 2009 until January 2012. He has been a Board member of IOCE since October 2010 and member of the EvalPartners Management Group since January 2012. He is a Facilitator of the Francophone Regional courses on Participatory Planning Monitoring and Evaluation-Managing for Impact jointly run by AfrEA-CDI, Wageningen-ISSP and the University of Ouagadougou. Issaka Herman Traoré is currently the M&E Specialist of the international NGO Search for Common Ground in Burundi.



TRETIAKOVA, Tatiana, is a Coordinator of the National Monitoring and Evaluation Network of the Kyrgyz Republic. She graduated from the Tomsk Institute of Automated Control Systems and holds degrees in sociology and psychology. During 1999-2001 she co-authored the UNDP Annual National Human Development Report for

Kyrgyzstan. Since 2000 she started evaluation activities as a member of the International Program Evaluation Network (IPEN) and has been participating in working groups elaborating national and regional development strategies and programs and in government commissions on optimizing local governance, where she served as policy and evaluation expert. In 2007 she co-founded the National M&E Network to promote evaluation as a tool for increasing the transparency and effectiveness of management processes. The two main goals coordinated by Mrs. Tretiakova are the formation of a strong professional expert society that can influence organizational interactions with government bodies, as well as increased transparency of the government.



WALLY, Nermine, is an Egyptian national and a socio economic researcher with experience in gender issues, poverty alleviation and participatory initiatives. Through fieldwork and direct contact, she has developed deep knowledge of the policy issues facing non-governmental organizations, youth, women and rural households in

Egypt and Africa. In her latest appointment as Senior Governance Specialist in the Egyptian Cabinet to respond to Egypt's developmental needs, she worked closely on the governance and anti-corruption agenda of Egypt. She also contributed to the development of the national M&E framework to assess Egypt's Millennium Development Goals. Nermine's expertise is centered on monitoring and evaluation, institutions, and governance. She speaks Arabic,

French and English and acted as consultant for a number of national and international organizations in the Middle East, Africa and South Asia. Nermine has served in the AfrEA Board between 2009-2011 as Regional Representative for the MENA region and was Acting Secretary for the same period. In 2012 she was elected President of AfrEA. She also served as Secretary for IOCE. Nermine holds a BA in Political Economy from the American University in Cairo, and MA in Public Affairs from Sciences Po, Paris.



WHITMORE, Bessa, a long time AEA and Feminist TIG member, is Professor Emerita at Carleton University, Ottawa, Canada. Her particular interest has been the application of participatory approaches to research and evaluation. Over the years, she has conducted numerous evaluations, applying a participatory model that involves engaging stakeholders directly in all aspects of the process. Her publications include a *New Directions in Evaluation (NDE)* volume entitled *Understanding and practicing participatory evaluation* (1998), a book on international development (*Seeds of fire: Social development in an age of globalism*, 2000), and *Activism that Works* (2011), a co-edited book based on a collaborative research project with 9 social justice and environmental activist groups and organizations across Canada. Most recently, she has been engaged in a process to bring together the various strands of collaborative approaches to evaluation, articulated in a forthcoming *American Journal of Evaluation (AJE)* (2013) article entitled "Arguments for a common set of principles for collaborative inquiry", co-authored with J. Bradley Cousins and Lyn Shuhla. A chapter by Bessa on the role of the feminist evaluator will be included in the forthcoming volume *Feminist evaluation and research: Advances in understanding and implementation*, co-edited by Denise Seigart, Sharon Brisolara and Saumitra SenGupta.

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This book makes a significant contribution to these discussions by offering a number of strong contributions from senior leaders of institutions dealing with international development and evaluation. These are: UNEG, UNICEF and UN Women from the United Nations; the Independent Evaluation Group and the CLEAR centres from the World Bank; OECD/DAC Network on Development Evaluation and the Government of Finland from the bilaterals; and the International Organization for Cooperation in Evaluation (IOCE) representing the global community of VOPEs.



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This publication is available in English, French, Spanish, Russian and Arabic.



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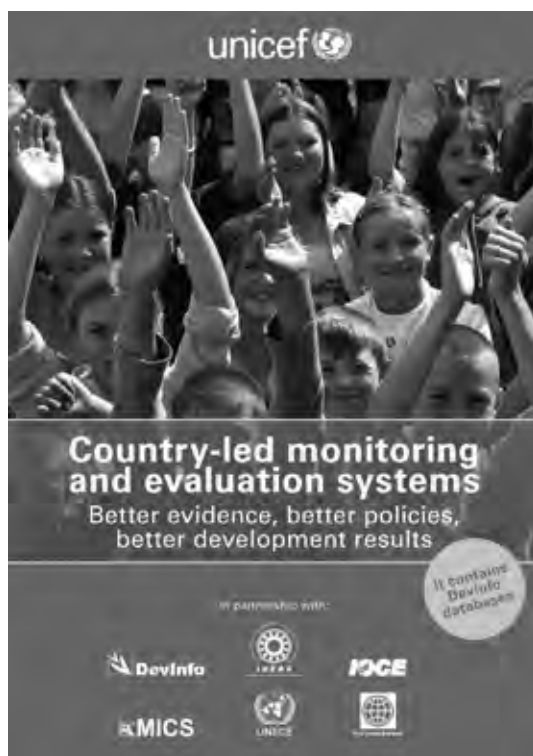
Within the international community, there is a growing recognition that national capacity development for monitoring and evaluation systems is an essential part of the broader support to policy reform and to promoting national ownership of evidence-based policy making. With the aim of sharing good practices and lessons learned on this strategic issue, UNICEF and IOCE (International Organization for Cooperation in Evaluation), in partnership with UNDP, WFP, UNIFEM, ILO, World Bank and IDEAS (International Development Evaluation Association) published this book. This publication offers a number of strong contributions from senior officers in institutions dealing with national monitoring and evaluation capacity development, as well as senior Government representatives responsible for the national monitoring and evaluation systems in countries in Asia, Africa and Latin America.



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NOTES

In recent decades, civil society has increasingly played a central and active role in promoting greater accountability for public action, through the use of evaluation. National and regional Voluntary Organizations for Professional Evaluation (VOPEs) grew from 15 in the 1990s to more than 155 by 2012.

Acknowledging the enhanced role of civil society, UNICEF and IOCE launched EvalPartners. This is a global initiative that promotes coordinated efforts among development organizations, governments and civil society, with the aim of strengthening civil society evaluation capacity, in order to fortify the voice of civil society in policy-making and in promoting equity-focused and gender-responsive evaluations. EvalPartners was met with a surge of enthusiasm evidenced in the joining of 27 members, including all regional VOPEs, within a few months of its launch.

The goal of the EvalPartners Initiative is to contribute to the enhancement of the capacity of Civil Society Organizations (CSOs) – notably, VOPEs – to influence policy-makers, other key stakeholders and public opinion, so that public policies are evidence-informed and support equity in development processes and results.

The expected outcome of EvalPartners is three-fold:

- VOPEs are stronger. Their institutional and organizational capacities are enhanced.
- VOPEs are more influential. They are better able to play strategic roles in strengthening the enabling environment for evaluation within their countries. In so doing, they help to improve national evaluation systems and to promote the use of evaluation evidence in the development of policies geared towards effective, equitable and gender-equality responsive development results.
- VOPEs develop sustainable strategies to enhance the evaluation skills, knowledge and capacities of their members, and of evaluators more widely, to manage and conduct credible and useful evaluations.



<http://mymande.org>



<http://www.unicef.org/evaluation>



<http://ioce.net>