

Evaluating to Learn:

Monitoring & Evaluation Best Practices in Development INGOs

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EXECUTIVE SUMMARY

Overview (p. 1)

USAID Forward has spurred development assistance implementers to consider how USAID's new priorities will impact international non-governmental organizations (INGOs)' monitoring and evaluation (M&E) practices. The purpose of this study is twofold: first, to determine for IRD whether INGOs have changed their M&E practices in response to USAID Forward's Evaluation Policy, and in what ways USAID Forward has affected INGOs' M&E practices. Second, the report identifies best practices of development INGOs in implementing M&E. An analysis of best practices in M&E provides IRD with a resource it may use to evaluate its own M&E procedures in comparison to other organizations operating in the sector.

Methodology (p. 5)

The qualitative research identifies the evaluation best practices of nonprofit INGOs, and determines in what ways evaluation practices have changed in response to USAID Forward. Data sources include the existing literature on M&E in INGOs, open-ended interviews with M&E staff at selected INGOs, and documents and relevant reports from IRD and INGOs selected for interviews. A total of 22 individuals at 15 organizations were contacted for interviews. 12 individuals accepted interview requests, six individuals declined, and four individuals did not respond.

Challenges to M&E in INGOS (Summary Table on p. 6)

INGOs encounter a number of challenges when implementing or managing monitoring and evaluation activities. This report explores the following issues:

- Unclear M&E staff roles and responsibilities
- Insufficient M&E capacity of INGO staff and local partners
- Low staff ownership of monitoring and evaluation activities
- Conflicting accountabilities
- Undervaluation of M&E by upper management

Response to USAID Forward (p. 12)

Interviewees gave mixed responses regarding the influence of USAID Forward's Evaluation Policy on M&E practices. Four respondents contended that their organizations *are not* changing their M&E practices in response to USAID Forward's Evaluation Policy. One of those four respondents reported that USAID

has influenced the development of a new evaluation policy currently in progress at her organization however. Three respondents reported that their organizations *are* changing their M&E practices in response to USAID Forward's Evaluation Policy. Two respondents did not respond to whether or not their organization is changing its M&E practices in response to USAID Forward.

Best Practices (Best Practices Framework on pp. 16-17)

Best practices proposed in this study include tools and methods that INGO M&E staff members have implemented and find useful in supporting M&E activities. INGO M&E staff members engage in the following best practices to support M&E activities:

- Define M&E staff responsibilities in an agency-wide M&E framework
- Promote M&E learning at the organizational level
- Allocate sufficient time and resources for M&E in project design
- Develop M&E field staff and local partner capacity
- Conduct strategic impact evaluations
- Leverage technologies

Recommendation (p. 29)

The study includes recommendations that IRD apply the best practices outlined in this report to enhance its own M&E activities. Functioning M&E systems enable INGOs to achieve mission, improve programs, and attract resources, at the program and agency levels. INGOs can leverage their value add as implementing agencies to preserve their role in development assistance despite USAID and the international community's emphasis on local capacity building.

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OVERVIEW

Donor and recipient countries of development assistance have increasingly focused on ways to enhance aid effectiveness to reduce poverty. Over the past decade, the international community, led by the Organization for Economic Co-operation and Development (OECD) has committed to increase aid effectiveness by fostering cooperation between developing and developed countries, non-governmental organizations, multilateral institutions, and other actors in the development field. Establishment of results-oriented reporting and assessment frameworks that monitor progress against development strategies is a key component of this international effort to enhance aid.¹

The international trend of evaluating the impact of foreign assistance has also manifested domestically, in the Obama Administration's first Quadrennial Diplomacy and Development Review (QDDR), issued in 2010. The QDDR resulted in a stated commitment to plan foreign aid budgets "based not on dollars spent, but on outcomes achieved."² The United States Agency for International Development (USAID) implemented this idea into practice in 2011 through a new reform agenda developed as a part of the QDDR: USAID Forward.³ USAID Forward focuses on improving the effectiveness of development assistance through a threefold approach: building local sustainability and partnerships, fostering innovation, and strengthening local capacity to deliver results.⁴

USAID Forward has spurred development assistance implementers like International Relief and Development (IRD) to consider how USAID's new priorities will impact international non-governmental organizations (INGOs)' monitoring and evaluation (M&E) practices. The purpose of this study is two-fold: first, to determine for IRD whether INGOs have changed their M&E practices in response to USAID Forward's Evaluation Policy, and in what ways USAID Forward has affected INGOs' M&E practices. INGOs have speculated the ways in which USAID Forward may affect M&E at their organizations, yet no systematic study of INGO perceptions of USAID Forward's influence on their organizations currently exists. This study will provide preliminary observations of M&E staff on the policy and its impact.

Second, the report identifies best practices of development INGOs in implementing M&E. IRD may use this report as a resource to evaluate its own M&E procedures in comparison to other organizations operating in the sector. This study will focus on the M&E practices of INGOs comparable to IRD in size and service

1. *Working Party on Aid Effectiveness*: OECD Development Assistance Committee (DAC), March 2010.

2. Lawson, Marian Leonardo. *Does Foreign Aid Work? Efforts to Evaluate U.S. Foreign Assistance*: Congressional Research Service, February 13, 2013, 1.

3. U.S. Department of State. *Leading through Civilian Power: The First Quadrennial Diplomacy and Development Review*. Washington, DC: U.S. Department of State, 2010.

4. Clinton, Hillary Rodham. "Leading through Civilian Power: Redefining American Diplomacy and Development." *Foreign Affairs* 89, no. 6 (Nov/Dec 2010): 13; U.S. Agency for International Development, accessed Nov 18, 2012, <http://www.usaid.gov/results-and-data/progress-data/usaaid-forward>.

areas. It will not focus on how IRD may implement these best practices; rather it will provide an overview of key factors that M&E staff members have identified as significant to well-functioning M&E. Policy recommendations will be made based on M&E best practices of INGOs. The report continues with the following sections: 1) historical overview of U.S. government evaluation of foreign assistance, 2) definition of monitoring and evaluation terminologies, 3) methodology of the study, 4) discussion of challenges to M&E in INGOs, 5) INGO responses to USAID Forward, and lastly 6) M&E best practices.

Historical context of U.S. government foreign aid evaluation

The importance, purpose and methodologies of foreign aid evaluation have varied over the decades since USAID's establishment in 1961, in response to political and fiscal circumstances, as well as evolving development theories. Evaluation has gained prominence over the past decade, as foreign aid funding levels have increased while evaluations have decreased.⁵ A lack of evaluations has prompted questions about the knowledge basis for aid policy and how policymakers can develop effective foreign aid strategies without a clear understanding of how and why prior assistance has succeeded or failed.⁶ According to USAID Administrator Rajiv Shah, global development policies and practices are experiencing a "transformation based on absolute demand for results."⁷ Demand for results in the U.S. context arises from Congress, aid beneficiaries and American taxpayers who want to know the impact, if any, of foreign aid and whether foreign aid programs achieve their intended objectives.⁸

The push to hold government accountability for foreign aid results has led to new evaluation initiatives at U.S. foreign assistance agencies. An integral component of USAID Forward is a results-based "Evaluation Policy" that aims to strengthen evaluation and transparency to increase accountability to stakeholders and promote learning to improve effectiveness.⁹ The State Department followed suit in February 2012 with its own novel evaluation initiative that is analogous to USAID Forward's Evaluation Policy. The Millennium Challenge Corporation (MCC) also updated its evaluation policy in May 2012.¹⁰ The new State and USAID policies similarly balance the costs and expected gains from evaluation, although they do differ in substantial ways, such as different levels of support for impact evaluation. The policies "reflect a common emphasis on evaluation planning as a part of initial program design, transparency and accessibility of evaluation findings, and the

5. For historic information on foreign aid spending, see CRS Report R40213, *Foreign Aid: An Introduction to U.S. Programs and Policy*, by Curt Tarnoff and Marian Leonardo Lawson.

6. Lawson, *Does Foreign Aid Work?*, 1.

7. Statement of USAID Administrator Rajiv Shah to The Cable, as reported in *The Cable*, June 13, 2012. Rogin, Josh. *Hillary Clinton and Ben Affleck Team Up to Eliminate Preventable Child Death*. *The Cable*. Foreign Policy (FP), Wednesday, June 13, 2012.

8. Lawson, *Does Foreign Aid Work?*, 1.

9. U.S. Agency for International Development. *Evaluation Learning from Experience: USAID Evaluation Policy*. Washington, DC, 2011, 3.

10. Lawson, *Does Foreign Aid Work?*, 17.

application of data to inform future project design and allocation decisions.”¹¹

As part of its effort to reform foreign aid, the U.S. has pledged to coordinate efforts and increase recipient country control, or “ownership,” over the planning of aid projects and the management of aid funds in recent years.¹² USAID Forward and the QDDR promote these objectives. According to the QDDR, partnership can enable development policy “to ultimately support long-term, sustained progress and make assistance unnecessary in the long term.”¹³ To achieve that goal, the State Department recommends partnering with states that seek to build their own capacity, to maximize the impact of the assistance they receive, and to provide for their people. Similarly, USAID Forward aims to build local sustainability and partnerships, and strengthen local capacity to deliver results. In line with this goal, USAID has increased the amount of mission funding to host country government institutions, private firms and non-governmental organizations by almost 50 percent since Fiscal Year (FY) 2010.¹⁴ Many INGOs perceive country ownership of evaluation to mean that recipient countries, including local stakeholders will define the success or failure of development programs.¹⁵

Monitoring and evaluation defined

M&E may consist of various activities with distinct functions. As defined by USAID, “monitoring is an ongoing process that indicates whether desired results are occurring.” Monitoring aims to measure progress toward planned results, usually through preselected indicators. Evaluation differs from monitoring in that it consists of “the systematic collection and analysis of information about the characteristics and outcomes of programs and projects.” That information provides “the basis for judgments to improve effectiveness, and/or inform decisions about current and future programming.”¹⁶ Evaluation may refer to *impact* evaluations or *performance* evaluations; both have different objectives.¹⁷ M&E is a critical and often donor-required means of determining whether or not development assistance programs are achieving their planned targets. Most donor agencies now require, and in some cases fund, partner NGOs to install M&E systems at the project level.

USAID requires implementers of development assistance projects to define a M&E plan to measure progress toward planned results and to identify the cause of any delays or impediments during implementation. According to USAID, a M&E plan should provide a framework for monitoring and evaluation during a project.

11. *Ibid.*, Summary.

12. *Working Party on Aid Effectiveness*: OECD Development Assistance Committee (DAC).

13. U.S. Department of State. *Leading through Civilian Power: The First Quadrennial Diplomacy and Development Review*, 94.

14. *USAID Forward Progress Report*: U.S. Agency for International Development, 2013, 14.

15. *Comments on USAID’s Evaluation Policy*: InterAction, 2011, 8.

16. *ADS Chapter 203 Assessing and Learning*: U.S. Agency for International Development, 2012, 4.

17. *ADS Chapter 203 Assessing and Learning*: USAID, 6. See for more information regarding the differences between impact and performance evaluations.

The plan as defined by USAID constitutes a key component of the broader mission learning plan “that guides Missions in strengthening the evidentiary base of their portfolios, speeds learning and adapting project implementation to achieve high quality development results as quickly and sustainably as possible.”¹⁸ Project managers must work with USAID to ensure that all M&E plans include performance indicators that are consistent with and meet the data collection needs of the project M&E plan and the USAID Mission’s Performance Management Plan (PMP). Activity M&E plans submitted to USAID include only those indicators that the Mission needs for activity management, not the entire set of all indicators an implementer may use for its management purposes. USAID includes instructions to offerors or applicants to include costs of data collection, analysis, and reporting as a separate line item in their budgets to ensure that adequate resources are available. Monitoring for unintended results of activities should include the examination of any unintended negative consequences, especially those that could affect the safety of beneficiaries or their equitable access to assistance.¹⁹

USAID specifications regarding performance evaluations often limit the role of project implementers in evaluating projects or programs. For example, USAID requires that projects with funding at or above the average dollar size for each Development Objective for the USAID Mission or Office undergo evaluations lead by a team external to USAID and to project implementers.²⁰ USAID and other development organizations may prefer external evaluators because they can bring a range of expertise and experience that might not be available within the organization, and they may have more independence and credibility than an internal evaluator.²¹ While project implementers themselves may not conduct impact and performance evaluations, they support and sometimes manage third-party evaluations.²² The precise role of aid implementers in evaluation varies across the INGO community, from some INGOs conducting their own impact evaluations for organizational learning purposes, to others that do not engage in evaluations.²³

Despite USAID’s requirements that implementing agencies include a M&E plan, respondents reported varying M&E systems that differ at project and agency levels. The next section of the report delineates the methodology of the research, including the criteria used to select interview respondents, followed by a discussion of the challenges facing INGOs in implementing M&E activities.

18. *Ibid.*, 28.

19. *Ibid.*, 32.

20. *ADS Chapter 200 Introduction to Programming Policy*. U.S. Agency for International Development, 2012; *ADS Chapter 203 Assessing and Learning*: USAID, 31.

21. Rogers, Patricia J. and BetterEvaluation. "Introduction to Impact Evaluation." *Impact Evaluation Notes* no. 1 (2012), 3.

22. Rogers, "Introduction to Impact Evaluation," 4.

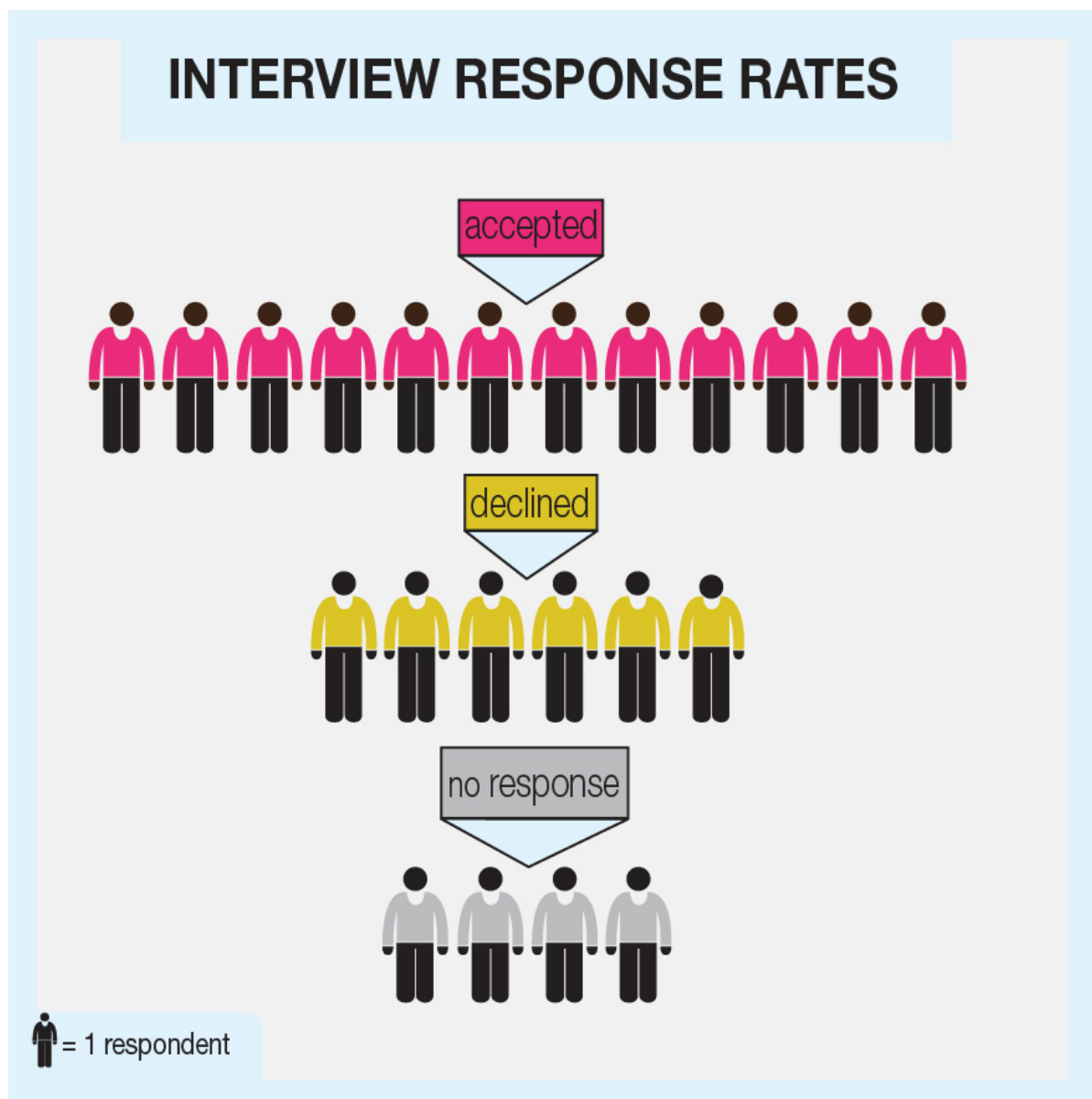
23. Africare. *Connecting M&E to Impact Evaluation*. Connecting M&E to Impact Evaluation. InterAction, April 26, 2012. Africare’s Connecting M&E to Impact Evaluation provides one example of an internal evaluation conducted by an aid implementer.

METHODOLOGY

The qualitative research identifies the evaluation best practices of nonprofit INGOs, and determines in what ways evaluation practices have changed in response to USAID Forward. Data sources include the existing literature on M&E in INGOs, open-ended interviews with M&E staff at selected INGOs, and documents and relevant reports from IRD and INGOs selected for interviews.

INGOs were selected for interviews through purposive sampling to include nonprofit INGOs comparable to IRD in service areas that have agency-wide M&E processes. See Figure 1 for interview response rates. Selected INGOs include those that implement development programs globally in areas such as community stabilization, health, agriculture, democracy and governance, and relief.

Figure 1. Interview Response Rates



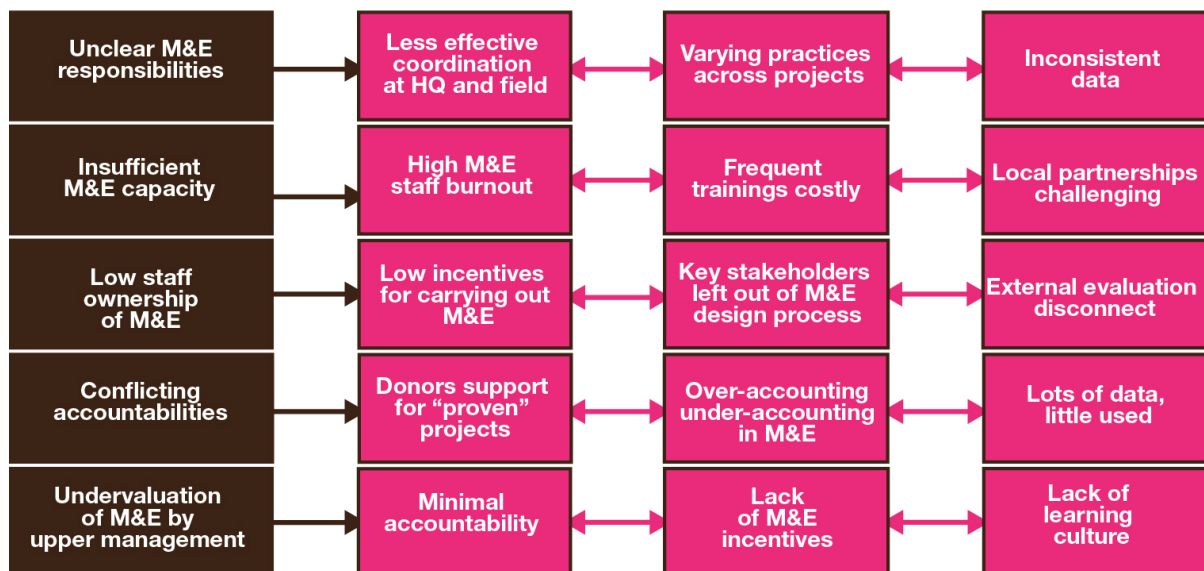
Snowball sampling where the interviewer asks interview respondents to refer her to other interviewees with M&E expertise was used. Sampling continued to the point of theoretical saturation, when no or little new information was extracted from the data.²⁴ 22 individuals at 15 organizations were contacted for interviews. 12 individuals accepted interview requests, six individuals declined, and four individuals did not respond, as shown in Figure 1.

Reasons individuals declined interviews include scheduling difficulties, organizational restructuring, an individual’s perception that she could not speak to the organizational aspects of M&E, and perception of IRD as a competitor for funding. Interviews averaged approximately 48 minutes in length. The time limit for this study restricted the sample of individuals selected for interviews to INGO Senior M&E Directors, and Senior M&E Advisors—a source of bias. A more comprehensive study would also include interviews with field M&E staff and other key stakeholders, such as upper management, and local partners. Appendix A includes a list of interviewed organizations, and Appendix B includes the questionnaire used to interview key informants.

CHALLENGES TO M&E IN INGOS

INGOs encounter a number of challenges when implementing or managing M&E activities. Research from the literature and interviews revealed five primary problems that INGOs encounter related to M&E depicted in Figure 2.

Figure 2. M&E Challenges



24. Guest, Greg, Emily E. Namey, and Marilyn L. Mitchell. *Collecting Qualitative Data: A Field Manual for Applied Research*, 2013.

Unclear M&E staff roles and responsibilities

INGOs often lack well-defined roles for M&E headquarters and field staff members at the institutional level. One respondent described how the “foundation for M&E is there and guidance, but practice varies (3).”²⁵ Staff members frequently lack clarity regarding their M&E responsibilities, which leads to confusion about “who does what” and “who to go to” for M&E guidance (1). Inconsistent M&E and program staff structures contribute to less effective coordination at headquarters and less in the field.²⁶ Headquarters and field office staff thus may repeat past mistakes in program implementation that they could avoid through better communication and knowledge sharing.

Headquarters staff members often aim to ensure consistency and some degree of quality of field M&E activities at the institutional level, but are not usually involved in designing and implementing M&E at the project level. Headquarters staff members often have trouble maintaining standards across projects as a result (1). Projects that cut across different regions particularly pose problems to organizations as they struggle to clearly define roles for headquarters and field M&E staff. Too much decentralization of M&E activities to local field offices without review by headquarters may lead to people “making up systems” and not using M&E best practices (5). Without review, field offices may use varying M&E practices, which leads to inconsistent data quality. Field offices often do not know how to use the data for good effect, and may find themselves “lost in the morass of data collection (5).” Headquarters staff members have found a need for some review of field M&E activities, but too much supervision overstretches already limited M&E headquarters staff capacity.

Insufficient M&E capacity

INGOs typically suffer from limited M&E staff capacity and not enough critical resources for M&E activities, such as funding for information management, and time to establish M&E systems, collect data, train staff and partners, and monitor and reflect on data collected.²⁷ High turn over of field staff makes basic M&E training for field program and M&E staff difficult and costly. Time and resources invested in training often go to waste as a result of high turn over as well. Headquarters sometimes finds engaging with field staff on a regularly basis challenging and may experience difficulties in communicating with field staff and updating them regarding new M&E materials and approaches (3).

25. Citations for interviews throughout the remainder of the report will be included in the text as numbers to reduce redundant footnotes. For example, here (3) refers to a telephone interview with a M&E Specialist on February 12, 2013. Full citations are included in the “Interviews” section at the conclusion of the report, preceding references.

26. Walker, Sophie and Alison Hemberger. *Agency-Level Measurement: Continuing the Conversation*. Monitoring and Evaluation. InterAction, December 11, 2012, 10.

27. *A Guide for Project M&E*: International Fund for Agricultural Development, 2002, 3-30.

INGOs frequently experience high M&E staff burnout rates (3). The role of M&E staff varies at different organizations, but typically encompasses a wide variety of activities. Some of those activities include designing projects, analyzing problems, developing logframes, indicator tracking tables, and evaluation frameworks, managing evaluations, utilizing evaluations, rolling up agency level indicators, and conducting operations research. Headquarters staff members often provide substantial guidance to their counterparts in field offices during the design process of M&E at the proposal level during selection of indicators and identification of data collection methods (3). The advisory role of headquarters staff members varies depending on the resources available at the country level. Larger projects may have high-level M&E staff, but field offices at the country level rarely do (3). Project managers and program officers at the project level may outsource M&E activities to headquarters staff, or local consultants or firms as a result. M&E staff usually advises more than one project at a time, and have a regional or sectoral assignment with a vast portfolio. Taking on the M&E work of too many individual projects overextends limited M&E capacity and leads to rapid burnout of M&E staff. High burnout and turn over rates make recruitment of skilled M&E staff difficult, and limits the organizational expertise available to support M&E development (3).

The broad range of capabilities and sophistication of country evaluation partners differs by country and often makes local partnerships challenging. Varying competency levels of local partners such as government statistics agencies may require INGOs to provide technical assistance, quality checks, and management of M&E activities to some country partners, and provide little technical assistance to others (4). Field staff often does not have the knowledge or the time to identify qualified local partners and to monitor the activities of hired local partners. Ensuring that staff and local partners in the field have sufficient knowledge, cultural sensitivity, and awareness to conduct M&E activities often requires training from headquarters or a local firm. However, budget constraints such as securing funding from the programming budget, often prevent adequate training in M&E. Even with sufficient field staff capacity, partnerships may fail for other reasons (1). Qualified local evaluators often cost more than the amount allotted for by INGOs in their budgets.

Low staff ownership of monitoring and evaluations

Outsourcing of M&E by program staff in response to inadequate staff capacity can decrease local ownership of M&E activities. Managers, program staff, field staff, and partners sometimes do not understand M&E activities sufficiently, and have difficulty conducting M&E in a manner that results in consistent data across the agency. Lack of understanding can impede local ownership of M&E by preventing field staff and local partners from inputting into decisions, and from determining indicators to measure project success. Field staff and local partners have a stake in determining those values and relevant indicators since how indicators are defined "represents [the] values of the program in defining what success is (1)."

Stakeholders frustrated by or left out of M&E during the design process will less likely take an interest in and commit to M&E activities.²⁸

Program and M&E staff often has low incentives for carrying out M&E.²⁹ Staff members often view M&E as a tedious, donor-imposed obligation unrelated to project implementation.³⁰ Field staff and partners often fail to correctly assess how much time M&E planning takes, and do not have strong incentives to dedicate time for planning (1). As a result, staff members do not allocate sufficient time and expertise to M&E in the start-up phase of a project. Failing to plan M&E activities at the beginning of a project may result in loss of data and information that staff cannot make up at a later stage (1). Inadequate flexibility in project design may inhibit changes to project strategy during implementation for M&E purposes.³¹ Program implementers often cut M&E first from the project budget, and projects tend to not adequately budget for M&E (5).

In some cases, such as in the early days of MCC, evaluation plans have directed program design, leading to excessive data collection, and limiting the actions of implementers, thereby jeopardizing their ability to bring about the desired results.³² External evaluations may lead to a low degree of ownership of evaluation findings by USAID and implementing partner staff, which reduces the likelihood that implementers will incorporate evaluation results in programming decision-making processes.³³ INGOs operate with the concern that performance assessments through evaluations provide funders with reasons to continue or halt funding. In accordance with its Evaluation Policy, USAID intends to explicitly link evaluation questions to specific future decisions of USAID leadership, partner governments, and other key stakeholders. As stated by USAID, “those decisions frequently will be related to how resources should be allocated across and within sectors and thematic areas and/or how implementation should be modified to improve effectiveness.”³⁴

Evaluation can lead to lack of collaboration, or even the development of an adversarial relationship, between evaluators and program implementers.³⁵ Internal and external evaluations that include implementing field staff may suffer from bias introduced by field staff that may want to “make their program look good” and therefore conceal or underestimate project errors (2). Issues of credibility and conflict of interest demand organizations to consider the engagement of project staff in ways that will not compromise the findings of evaluations. Field staff members commonly perceive evaluations, whether internal or external, as performance assessments by headquarters. Field staff thus may hesitate to permit headquarters staff to observe M&E systems at the project level. A pedantic

28. A Guide for Project M&E: IFAD, 3-29.

29. Walker and Hemberger. *Agency-Level Measurement*, 10.

30. A Guide for Project M&E: IFAD, 4-3.

31. *Ibid.*, 3-29.

32. *Comments on USAID's Evaluation Policy: InterAction*, 8.

33. *Ibid.*, 8.

34. USAID. *Evaluation Learning from Experience*, 7.

35. *Comments on USAID's Evaluation Policy: InterAction*, 6.

approach by headquarters staff that perceives field staff “needs something that they don’t realize they need” may complicate relations between these two groups (5). External evaluation teams may have a limited understanding of projects. External evaluators when hired by implementers may not conduct evaluations objectively enough; evaluators may “tell implementers what they want to hear” for fear that they may not receive continued business otherwise (4).

External evaluations may promote disconnect between monitoring from evaluation activities. Projects typically focus on internal tracking of short-term activities with limited opportunities to learn.³⁶ INGOs may regularly conduct evaluations focused on outputs, and changes in behavior and practices, but rarely engage in intensive, higher-level impact-related assessments. Some INGOs require external evaluations for projects over a certain monetary threshold or for projects with new innovative approaches; donors such as USAID also require external evaluations for projects above the median project size (4).

INGOs encounter operational and methodological difficulties in implementing their own impact evaluations in complex, unstable operating environments such as conflict areas. Challenges include access to necessary information, poor maintenance of documentation, and finding the right evaluator (3). Also, factors outside the intervention may contribute to impact, which makes attributing causality to development programs challenging. INGOs sometimes consider randomized control trials (RCTs) uninformative because they do not reflect the reality of the context of development programs. INGOs still struggle to standardize reporting of robust, quality information, and the field as a whole attempts to identify approaches that work and do not during program implementation—methods often difficult to capture through evaluations. Implementers admit a lot of work still needs to be done on how to measure program implementation to have more information on what programs seem to work. Also, INGOs still struggle to develop methods to evaluate approaches to measure scaling up of projects, such as how to implement programs on a large scale with country governments (3).

Conflicting accountabilities

The social, economic, and ecological impact associated with development assistance makes aid inherently political with a wide range of stakeholders that demand high levels of accountability from aid implementers.³⁷ As a result, INGOs balance multiple functional and strategic accountabilities downward to their partners, beneficiaries, staff and supporters and upward to their trustees, donors, and host governments.³⁸ Multiple accountabilities lead to behavior in INGOs that

36. A Guide for Project M&E: IFAD, 4-3.

37. Crawford, Paul and Paul Bryce. "Project Monitoring and Evaluation: A Method for Enhancing the Efficiency and Effectiveness of Aid Project Implementation." *International Journal of Project Management* 21, (2003): 364.

38. Edwards, Michael and David Hulme. "NGO Performance and Accountability: Introduction and Overview." Chap. 11, In *The Earthscan Reader on NGO Management*, edited by Edwards, Michael and Alan Fowler, 194.

may result in “over-accounting” and “under-accounting” in M&E to meet the demands of diverse stakeholders.³⁹ INGOs aim to communicate their effectiveness to stakeholders, such as donors, while donors aim to support effective INGOs. However, stakeholders may define organizational effectiveness differently and therefore employ different criteria and reach different conclusions.⁴⁰ Program staff members have incentives to demonstrate project success that may conflict with the agency reporting requirements and create tension between program and evaluation staff (3). Also, INGOs may have trouble determining the beneficiaries of a project, let alone measuring outcomes for beneficiaries (8).

A risk adverse culture promoted by donor financing of successful projects encourages INGOs to reiterate “proven” projects rather than adapt programming to better meet development realities.⁴¹ Field staff members often collect data to adhere to donor requirements, but do not have a strategy for how they will use the collected data (5). Similarly, log frames meet donor requirements rather than inform program thinking and design.⁴²

M&E often focuses too heavily on data collection while neglecting data analysis, which results in lots of data collected, but little data used.⁴³ INGOs typically do not have the staff resources to translate systematically derived data to useful findings that can inform decision-making processes.⁴⁴ Reporting outputs and outcomes generally outweighs learning and subsequent calibration of programming to incorporate lessons learned.⁴⁵ Data collection often results in extraneous information that does not justify effort spent (3). Agency-wide data systems often do not promote understanding of how programs work at the project level. Also, agencies may require ineffectual data for annual reports that do not provide an effective measure of programs (3).

Undervaluation of M&E by upper management

One respondent emphasized how expectations pave the way for M&E staff to “do the work they need to do (3).” Upper management support that constantly reinforces M&E plays an important role in holding people accountable and ensuring that “M&E is happening, not just being talked about.” Without personal performance

39. Edwards and Hulme. "NGO Performance and Accountability: Introduction and Overview," 194.

40. Mitchell, George E. and Cesar Sevilla. *Defining Organizational Effectiveness*. Transnational NGO Initiative ed. Vol. 1 Maxwell School of Citizenship and Public Affairs, Syracuse University, Spring 2011.

41. Ebrahim, Alnoor. "Accountability in Practice: Mechanisms for NGOs." *World Development* 31, no. 5 (2003): 817.

42. Malhotra, Anju. *Connecting Routine M&E with Impact Evaluation*. Impact Evaluation Design Clinic. InterAction, May 10, 2010, 5.

43. Malhotra, *Connecting Routine M&E with Impact Evaluation*, 5.

44. Torres, Rosalie T. and Hallie Preskill. "Evaluation and Organizational Learning: Past, Present, and Future." *American Journal of Evaluation* 22, (2001): 389.

45. Malhotra, *Connecting Routine M&E with Impact Evaluation*, 5.

goals or other accountability mechanisms in place at the organizational level, staff members have minimal incentives to complete M&E tasks as assigned or directed.

Strong and consistent support from senior leadership is also critical to establishing a learning culture at an organization.⁴⁶ Perception of performance assessments and evaluation as a learning tool, promoted through leadership buy-in, acts as an internally driven mechanism that forces accountability.⁴⁷ Lack of internal mechanisms to enforce M&E roles and responsibilities also decreases the likelihood that staff members will conduct M&E activities efficiently and thoroughly.

RESPONSE TO USAID FORWARD

Interviewees gave mixed responses regarding the influence of USAID Forward's Evaluation Policy on M&E practices. Four respondents contended that their organizations *are not* changing their M&E practices in response to USAID Forward's Evaluation Policy. One of those four respondents reported that USAID has influenced the development of a new evaluation policy currently in progress at her organization however. Three respondents reported that their organizations *are* changing their M&E practices in response to USAID Forward's Evaluation Policy. Two respondents chose not to speak to whether or not their organization is changing its M&E practices in response to USAID Forward. See Figure 3 for interviewee responses to whether USAID Forward has affected M&E practices at the INGOs where they work.

Respondents gave several reasons unrelated to USAID Forward for why their organizations are evolving their M&E practices. One respondent contended that M&E practices at her organization developed in response to a general increase in standards and attention around the use of M&E in the development field and amongst donors. Another respondent explained that her agency has changed M&E practices based on the "organization's needs." Changes have largely come about in response to an increasing emphasis on learning in the development community, and consideration of M&E as part of the professionalization of peace building (7).

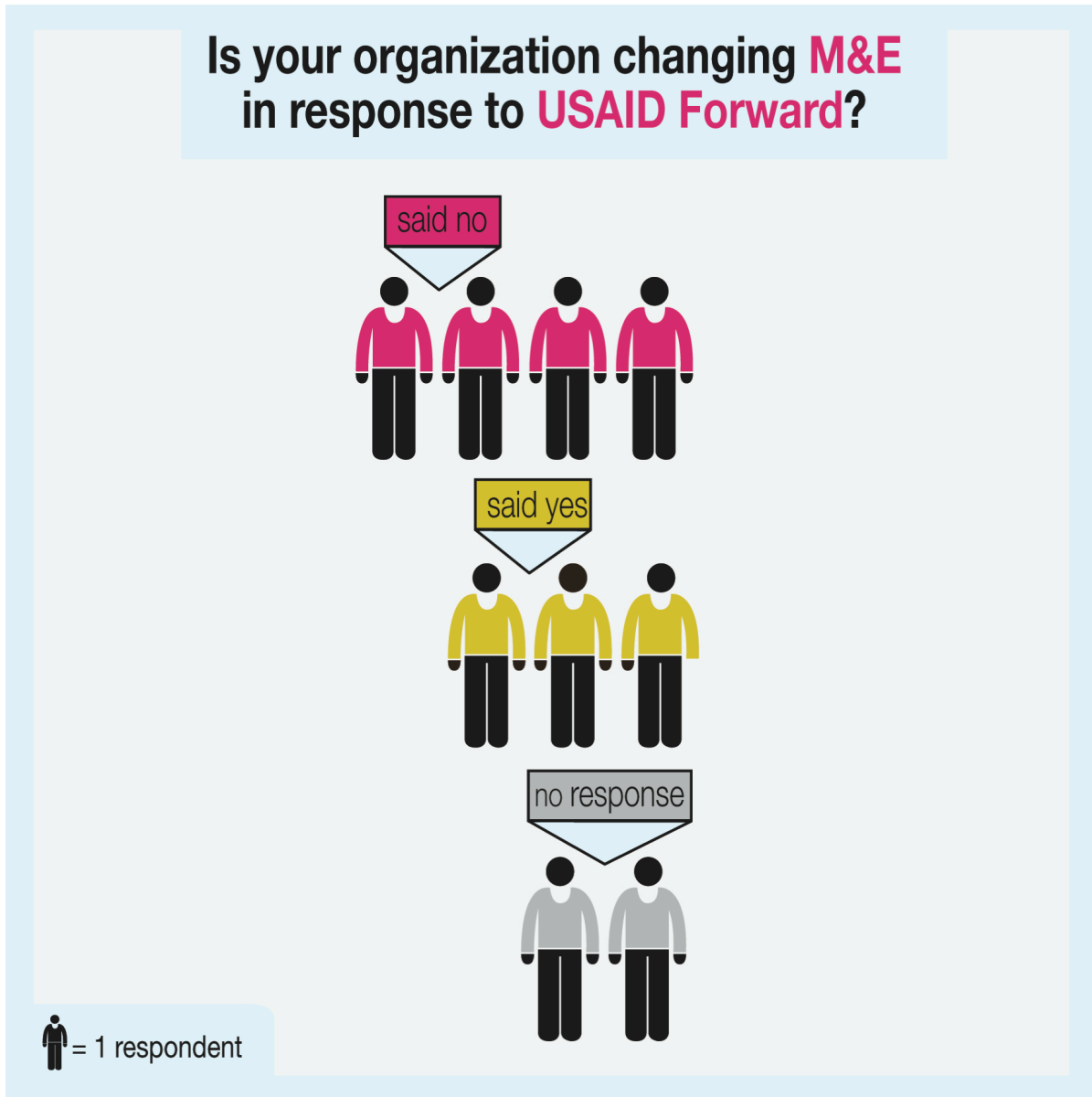
A different respondent stated that her organization has not changed its M&E activities in response to USAID Forward, and that existing M&E policies align with USAID's past evaluation systems (4). As an implementing partner, however the agency has questions regarding how USAID intends to implement its Evaluation Policy and what role the agency will hold as an implementing partner. M&E staff at the agency have advocated for development policy changes by the US government in conversations with USAID through working groups, such as the one organized by Interaction, a network of development INGOs. INGOs come together through the Interaction network to provide feedback to US government. The respondent described the agency's "high-level strategy involvement:" the agency gave input to

46. Bonbright, David. "Use of Impact Evaluation Results." *Impact Evaluation Notes* No. 4, 15.

47. Ebrahim, "Accountability in Practice: Mechanisms for NGOs," 825.

USAID during the development of the Evaluation Policy based on feedback from country offices regarding how evaluations implemented.

Figure 3. Response to USAID Forward



INGOs remain unclear as to how implementing agencies will work with third parties evaluators to make sure implementing staff know about evaluations at the start of project. Evaluation design may affect project design if implementing partners know that the project will be evaluated by USAID in that project and evaluation design inform each other and “evaluation is not considered an add-on (4).” The respondent also pointed out that other issues related to the policy require clarification, such as whether USAID will withhold all evaluation resources from

implementing partners. The focus of USAID Forward may require implementers to maintain their M&E budgets, but to date USAID Forward has not required implementers to allocate specific levels of funding for M&E activities. The respondent suggested that implementing agencies might have reason to communicate with USAID about the need to make sure external evaluation teams understand projects. Presently, the policy does not make clear whether implementing partners may contribute to evaluation findings, or whether they have the opportunity to respond to evaluation findings.

Another respondent explained that her agency has not changed policies in response to USAID Forward but that the policy “is definitely helping to frame the new, Evaluation Policy [they are] currently developing (9).” She also conveyed the policy as an “added impetus” that informs M&E strategy by increasing understanding of USAID’s expectations and external requirements and ready implanting agencies for what they can do internally “to prepare for and be a part of that process.” Colleagues of the respondent at her agency have also participated in the Interaction working group and provided input to USAID regarding its new Evaluation Policy.

Other respondents cited USAID Forward as an important factor that has influenced the relevance of M&E at their organization. One respondent, for example, described how her organization did not budget for M&E before USAID Forward, and now, as a result of the initiative of the M&E Director, the organization allocates five to seven percent of its budget for M&E (6). The Evaluation Policy has also provided the impetus for one organization to assist country offices to better understand expectations around evaluation. According to one respondent, the organization where she works, “would not have put out its own evaluation policy had USAID not done it (5).” The respondent explained that evaluation, but not monitoring, has received much more attention from senior leadership as result of USAID’s policy. The high level of attention given to USAID Forward has increased the organization’s preparation for external evaluations, and the organization now has an internal metric that tracks evaluation and receives the attention of senior leadership.

The Evaluation Policy also provides a mechanism to check the performance of external evaluators. Implementers may reference the policy if they “don’t like the way an evaluation is going.” For example, recently a country office would not share its Terms of Reference for an evaluation. The implementing INGO appealed to USAID’s Bureau of Policy, Planning, and Learning to check the obligations of the evaluator under the Evaluation Policy.

Another change emanating from USAID Forward for implementing INGOs is an increased emphasis on local partner capacity development. One interviewee mentioned how implementers feel the need to defend their “value added” in supporting local partners to demonstrate why USAID Forward “is a bad idea (1).” The respondent described international INGO advocacy efforts, such as working groups to influence USAID’s decision-making processes so that USAID’s future development assistance policies better align with M&E best practices as seen by implementing agencies.

Another respondent expressed that his organization is changing its M&E practices in response to USAID's evaluation policy. He argued that it does not make sense for implementers to conduct or manage evaluations. As an implementing agency, the organization has a comparative advantage in project design, implementation, management, and monitoring (8). Research-oriented organizations could conduct more robust evaluations better than an implementing agency. Even if an agency does have people with the requisite skills to conduct rigorous evaluations, it typically has relatively few, if any staff with such abilities. The agency has developed a toolkit as part of its effort to tighten up practices and procedures across the organization, in response to changes in its external environment influenced by USAID Forward. The respondent described the toolkit as one best practice that he and his team have found to support the implementation of M&E activities.

M&E BEST PRACTICES

Best practices proposed in this study include tools and methods that INGO M&E staff members have implemented and find useful in supporting M&E activities. INGO M&E staff members engage in the following best practices to support M&E activities:

- Define M&E staff responsibilities in an agency-wide M&E framework
- Promote M&E learning at the organizational level
- Allocate sufficient time and resources for M&E in project design
- Develop M&E field staff and local partner capacity
- Conduct strategic impact evaluations
- Leverage technologies

Table 1 outlines a best practices framework that includes M&E responsibilities for staff members at the agency, regional, and project levels.

Define M&E staff responsibilities in an agency-wide M&E framework

Respondents have found that defining the respective M&E roles of staff members facilitates cooperation and increases the consistency and quality of M&E activities. One respondent described the need to make “everyone in the chain aware of the importance of M&E,” including people managing the project at the headquarters level, the chief of party, and program staff responsible for implementing M&E at the project level (2).

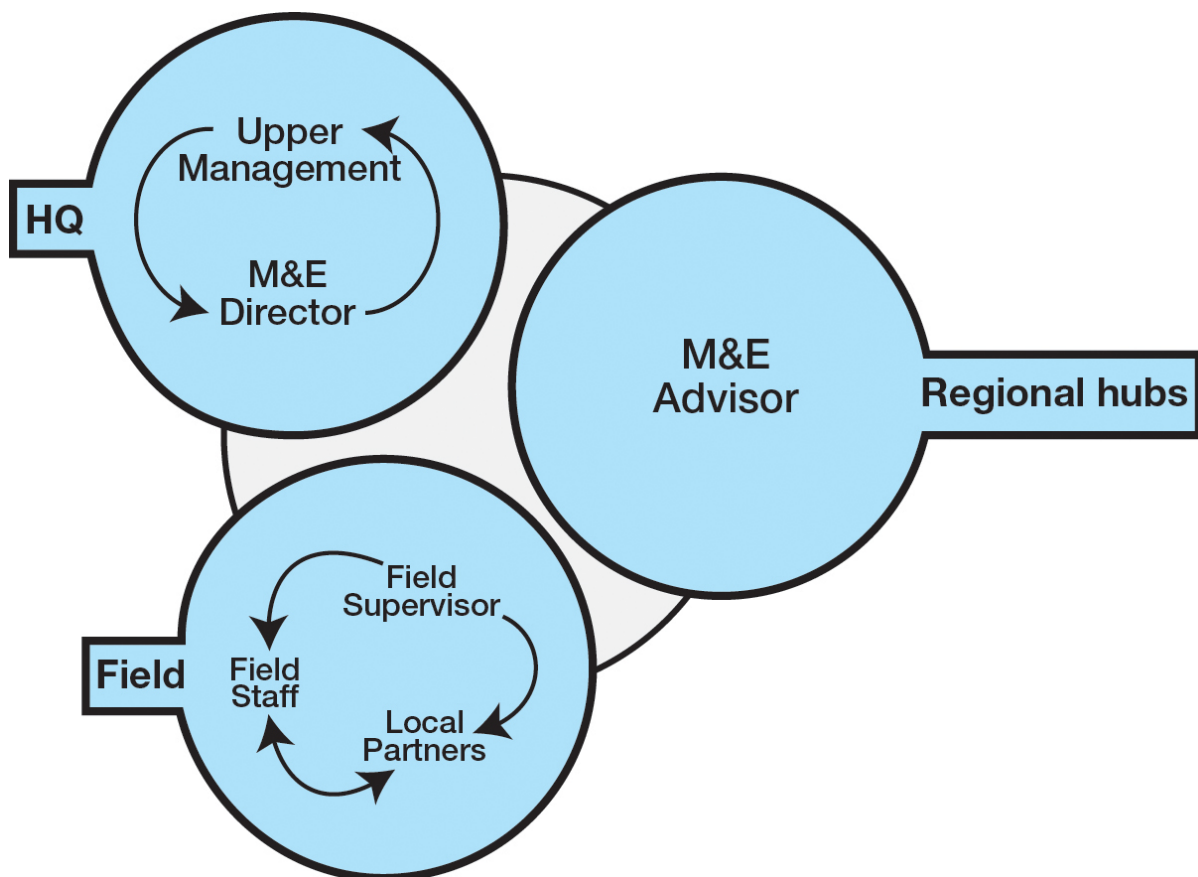
Table 1. Best Practices Framework

	AGENCY LEVEL		REGIONAL LEVEL	PROJECT LEVEL
BEST PRACTICES	Upper Management	M&E Director	M&E Advisor	Field Manager
Define M&E Staff Responsibilities	Hold M&E staff accountable through staff performance evaluations.	Train all M&E staff; conduct data quality assessments for each project to ensure staff in the field is doing M&E activities; maintain minimum standards through checklist or other mechanisms.	Guide M&E across multiple programs to help streamline M&E tools.	Define M&E responsibilities at the project level; monitor the quality of work contracted out, and provide technical oversight to ensure the quality of data collection by local partners.
Promote M&E Learning	Promote a culture of learning by constantly reinforcing the significance of M&E and setting expectations; align M&E practices with the organization's mission to ensure program goals meet agency objectives.	Encourage training workshops on M&E basics at the agency-wide level to promote a "common approach" and understanding of M&E.	Hold regional calls with M&E regional advisors once a month to share lessons learned.	Communicate and demonstrate how M&E facilitates project management; promote continuous learning among field staff and local partners through reflective meetings.
Allocate Resources for M&E	Require a minimum M&E budget for each project.	Communicate with field supervisors regularly to gauge levels of support provided for field staff.	Provide M&E support for field staff and local partners.	Ensure sufficient time and resources for M&E activities in the beginning stages of project design.

Develop M&E Capacity	Provide sufficient funding to hire qualified local partners.	Encourage field staff from different sectors and regions to share their experiences and lessons learned through regular meetings.	Chair monthly meetings with different regional advisors each month to build ownership and local capacity.	Involve local government and partners in the development and testing of M&E frameworks for scalability; establish program goals and objectives with program staff, and link activities to program objectives.
Conduct Strategic Impact Evaluations	Conduct strategic evaluations to increase ownership and showcase results.	Train field staff to manage evaluations better and improve communication with local partners enhances M&E conducted through local partnerships.	Write management responses to evaluation findings to increase ownership.	Involve project staff in external evaluations to advise on implementation process and recognize how evaluators interact with local communities.
Leverage Technologies	Create a connected, web-based agency-wide community to share best practices.	Use web-based databases to prepare handouts for project managers so s/he can observe project performance on a yearly basis; develop online M&E toolkits.	Use Skype to connect with different regional advisors.	Go mobile to collect data; use geographic information system (GIS) technology to map projects.

M&E staff of one agency drafted a document that outlines M&E responsibilities after experiencing difficulties during M&E design and implementation. According to that document, project level teams and partners in the field are primarily responsible for direct project coaching and setting up M&E activities (1). Headquarters aims to ensure consistency and quality of project level M&E, but has difficulty doing so because of its overseeing role. To overcome these difficulties, headquarters staff at this organization speaks with field supervisors regularly to gauge the levels of support that supervisors provide for field staff involved in M&E activities. Regular communication—visualized in Figure 4—enables headquarters staff to identify solutions to problems in different situations, and to apply their support consistently across regions and sectors (1).

Figure 4. Intra-agency M&E Communication and Collaboration



Another INGO requires the development of a Performance Monitoring Plan (PMP), maintained in a database in Microsoft Access or Excel, and under the responsibility of at least one M&E Manager or “M&E Specialist” hired locally for each project. Headquarters reviews the candidates for these positions and selects the best candidate (6). The organization requires that each M&E Specialist belong to a Community of Practice. M&E Managers report M&E data on a yearly basis in staff meetings to the Chief of Party, while M&E Specialists report to the Deputy

Chief of Party. The organization requires both Scope of Work and Terms of Reference documents for each M&E Manager and M&E Specialist to maintain consistency of requirements across the organization.

Headquarters staff at a different organization maintains a level of minimum standards through its Framework for Practice, which outlines best practices for field offices and partners in designing and implementing M&E systems (1). The Framework for Practice guides field staff in ways to design its M&E plan and set up reflective M&E data collection for implementing monitoring and impact evaluation activities, designated by the interviewee as measuring for results at the end of the project. As described by the interviewee, the Framework is much more than a policy “in some handbook that goes in some drawer.” A crosscutting team recently developed the Framework by borrowing heavily from other agencies and analyzing core documents, and designed the Framework to align with the organization’s values and priorities. The main objective of the Framework is to improve existing, but inconsistent M&E practices often not followed by staff, and to promote a culture of learning within the organization. Headquarters staff also plays a convening role within their organization by encouraging field staff from different sectors and regions to share their experiences and lessons learned. According to the respondent, sharing knowledge promotes the goal of maintaining consistency in M&E activities across projects as staff members implement activities in ways learned from their peers.

One respondent described how its agency is now taking a more prescriptive approach to M&E although the organization has traditionally engaged in more field driven approaches to development, without centralized policies. Now the agency requires a country level M&E advisor or specialist to guide M&E across multiple programs to help streamline ME tools, rather than have M&E staff embedded in specific projects (9). The respondent admitted the difficulty in striking a balance between having dedicated M&E resources and not having M&E “siloes.” She emphasized the importance of integrating program management, program implementation, and staff functions so that M&E “is part of everybody’s job (9).” Designating one person as solely responsible results in lots of M&E “getting lost.” Promoting the idea that M&E is everyone’s responsibility makes M&E more about improving project performance, not compliance or auditing. The respondent suggested during program kick off to have deep, substantive workshops on program goals and objectives with program staff, and link activities to program objectives, measured through clear indicators.

Similarly, another INGO has M&E specialists with six to eight countries in their portfolio to “create a manageable size of relationships,” comprised of staff that know each other and work together extensively. The agency also makes sure to staff sufficiently at the project and headquarters levels to provide degree of support that staff needs (7). Relationships between M&E staff vary from project to project, but the agency has an internal FAQs Guide to help staff navigate M&E responsibilities, and manage those responsibilities both formally and informally. Another INGO assigns a regional M&E officer that provides more direct access for field staff and local partners than headquarters M&E staff (1). Partner agencies also

need trained M&E staff, not to outsource activities, but to ensure proper oversight of activities. One INGO assigns at least one M&E specialist to each project (6). Headquarters trains all M&E staff, and conducts data quality assessments for each project to ensure staff in the field is doing M&E activities. Yet another agency assigns at least one DME Manager or Coordinator for each country, and has project officers in some countries with M&E responsibilities (7).

A respondent at a different INGO described its agency-wide evaluation policy as an outgrowth of USAID Forward's Evaluation Policy, focused on helping country offices and projects to understand expectations around evaluation (5). The policy sets a minimum threshold that projects over \$1 million dollars have baseline and endline evaluations. Currently, a central technical team uses a checklist to advise country offices on M&E, and has used the checklist to establish a minimum standards policy. The organization uses an "index approach" that "sets bronze and gold standards" regarding M&E responsibilities required of staff, and the tasks they would complete ideally in formal evaluation of a project.

Another respondent described how its organization provides handbooks that guide country offices in how they should look at evaluating and planning evaluations of projects (4). The agency considers donor and organizational requirements as complementary: in the absence of donor requirements then the agency will implement its own evaluation requirements. The agency involves project staff in external evaluations to make sure the external evaluating team understands the project and looks at monitoring to see how things have changed over time while conducting the evaluation. An iterative process between project staff and evaluators enables the external evaluation team to understand the implementation process and permits project staff to recognize how evaluators interact with local communities throughout the evaluation.

Promote M&E learning at the organizational level

A number of respondents emphasized the significance of promoting M&E at the organizational level through regular meetings with staff involved in M&E activities. One respondent described how her agency uses its Framework for Practice to cultivate "reflective learning loops" that integrate lessons learned into program design at the project, regional, sector, and organizational level (1). Reflective meetings required after receiving quarterly data and at the end of every project promote continuous learning among field staff and local partners. During reflective meetings, field staff and local partners consider the objectives of the project, progress made toward those objectives, and how current project results contribute to the end goal of the program. Staff members also discuss what they have learned anecdotally from working with beneficiaries about "what is working and what is not." Reflective meetings culminate in a report completed by partners on the ground. Similarly, another respondent mentioned how her agency convenes leadership conferences each year, comprised of field staff from each country where it has programs (2). The conference offers a time for staff to "take stock" of programs,

and to share their experiences. Another agency convenes all 50 M&E Specialists from each project in an annual meeting to discuss lessons learned (6).

M&E working groups at another organization enable employees to share information and approaches across sectors (3). Brown bag lunches offer time for staff to share approaches that apply across sectors, and offer the opportunity for staff members to gather feedback from their peers. In a current brown bag series, each sector takes turns presenting findings from their quarterly evaluations. For example, the education sector recently shared its experience of using mobile devices for data collection. M&E staff members hold additional brown bag lunches through their own initiative to promote knowledge and learning as well. Thematic areas where the agency has a strong technical focus have developed approaches and tools that can apply in other settings. Sharing of experiences within sectors has enabled staff members to develop tool kits from other projects that they use in different countries, within the same sector. Sharing across sectors can also prove useful to picking up lessons learned across programs. A standard set of tools that staff may adapt to different country programs lessens work burden when arduous M&E approaches to capture information with limited resources take much trial and error to develop. Brown bags at another organization also include webinars led by country staff, supported by headquarters during which country teams share the results of their projects to support learning, which informs the design process (7).

Respondents also described the importance of program and M&E staff across sectors to have an awareness and basic knowledge of M&E practices to support M&E activities. One agency offers training workshops on M&E basics at the agency-wide level to promote a "common approach" and understanding of M&E (3). Another organization has trained staff to have a basic understanding of M&E in the past, but high turn over of INGO employees demands regular, not one-time trainings (2). Headquarters staff and heads of projects play a key role in making training a priority at the organizational level. One respondent suggested making program and M&E officers learn a basic understanding of systems and minimum level of expected quality upon entering the organization (5). Staff would have standardized training courses with certification and a series of exams and practicum that would demonstrate knowledge learned. Agencies would follow up trainings with regular mentoring in the field. All new staff would get basic certification and then periodic refresher courses.

Several respondents contended that promoting M&E at the organizational level by aligning M&E practices with the organization's mission is critical to both realizing mission and demonstrating in what ways organizations achieve their objectives. One respondent described an "overarching view that it is important to monitor programs to make sure that you are reaching goals of the program that are also in line with the goals of the agency (2)." M&E ensures that the organization meets program goals that are typically directed toward achieving the organization's mission. Another respondent believes that good reflective learning is also crucial to doing better programming to reach organizational goals (1). Evolving M&E tools and program designs influenced by past projects at the organization and other agencies enable staff to collect qualitative and quantitative information, "check in"

with project targets, and reflect on progress. M&E provides the evidence needed for organizations “to say they’re doing their job the way they are supposed to be able to and say that they do.” One agency employs “Mission Metrics,” a defined mission statement in thematic areas and in measurable terms with mission indicators (9). The agency has developed program indicators aligned with one or more of the mission indicators that staff report in a single database that allows the organization “to reflect on, analyze, and aggregate results” according to mission based themes. Program management minimum standards promote adaptive management and learning throughout the lifecycle of the program. Mission metrics, as an “ideal, gold standard” helps the agency to understand achievements at the organizational level. The respondent from this agency explained how the new system, although the agency still struggles to figure out how to use results, should help determine resource allocation and shape organizational strategy. The agency deliberately made the agency level indicators about what the mission means, not in which sectors the organization works, to “stay true to mission.” Another organization has developed a set of Global Initiatives across agencies consisting of indicators reported yearly at institutional level that culminate information from project level (3).

Respondents mentioned the importance of high-level management support for an organizational M&E mandate that fosters M&E learning. The CEO of one organization recognized individual M&E staff and underscored the importance of the organization’s M&E initiative, and of doing M&E right (1). The VP and CFO also support M&E. Support of upper management by constantly reinforcing the significance of M&E and setting expectations pave the way for staff to “do the work they need to do.” The respondent at this INGO highlights the importance of not just talking about expectations, but also of holding M&E staff accountable and evaluating staff performance. M&E staff at the agency is presently considering methods such as requiring personal performance goals related to M&E to hold staff accountable for M&E responsibilities. Upper management committed to the value of M&E reassures staff that they have the support they need to embark on such staff performance evaluations. Other respondents illuminated how support for M&E trickles down and one cited upper management support as key to developing her organization’s current M&E practices over the past five years.

Institutional support has enabled one organization to move toward adopting high-level principles with accompanying procedures documents that articulate how the agency will mandate implementation of the policy, “to give teeth” to M&E procedures (8). Previously, the institutional environment did not make M&E a priority; now it does, not just to report to donors, but also to increase accountability to beneficiaries. Upper management support has enabled the agency to roll out a new SMILER toolkit that simplifies M&E processes and encapsulates all activities that staff members need to conduct for a robust M&E system at the project level. The toolkit delineates steps for setting up M&E systems so the agency can better report on indicators to donors and other stakeholders. Roll out of the toolkit has worked best in smaller groups better where staff members are working on live projects and may readily implement the toolkit. SMILER has proved useful for project management teams by promoting learning, adaptation, and response. M&E standards have also made the work of country offices easier.

Another agency has changed the name of its unit from DM&E to “DM&E and Learning” to try to move the discussion toward how the agency uses M&E tools and processes to learn continuously, not just for “policing” or “regulatory” functions (7). A new policy sets minimum standards on conducting evaluations at the conclusion of a program. Minimum standards include collecting lessons learned at the end of each program, and using and reflecting on lessons learned from other projects during the design phase. The agency is still in the early stages of roll out of the policy, so “getting standards institutionalized and in the right place is still a work in progress.”

Allocate sufficient time and resources for M&E during project design

A number of respondents enumerated how providing sufficient time and resources for M&E activities in the beginning stages of project design can make M&E more effective, more efficient, and more useful. One respondent has found that allotting sufficient time early in project planning supports the development of a more detailed M&E plan that identifies indicators, and determines data collection methods (1). Project kick off meetings, when partners and stakeholders come together, offer an opportune time to develop a M&E plan. The respondent described how project managers should take responsibility to allocate sufficient time for M&E during initial planning at kick off meetings, or during separate meetings for M&E activities only. Managers should also make arguments for the use and value of M&E to field staff by communicating and demonstrating how M&E facilitates project management rather than expressing M&E as an imposed headquarters or donor requirement. Managers should make clear distinctions regarding M&E responsibilities at the project level, rather than add them to an employee’s job description as an afterthought, without sufficient planning. Assignment of M&E tasks increases ownership, and ensures that program staff does not continuously outsource M&E to M&E staff. M&E field staff at one agency asked for a policy that would guide their managers, to give them the support and added priority they need to conduct M&E activities (9).

During project design at another agency M&E headquarters staff and M&E coordinators, along with country directors come together with regional support staff to write proposals together that include logframes, theories of change, and objectives (7). Teams have checklists to make sure every project includes these components. Headquarters assists country staff to ensure that the project has quality M&E systems in place including indicator-tracking tables and baseline studies of high quality. The agency includes local partners in reflection meetings after projects conduct baselines, and in most M&E activities, such as data collection. The agency budgets for reflection meetings and includes them in logframes to encourage adherence to the learning component of M&E activities.

Similarly, another agency designs for evaluations at the beginning of the project by making a M&E “tick box” part of proposal process (5). The agency includes a minimum evaluation budget for each project, even if the donor states that it will conduct the project evaluation. By budgeting for evaluations the agency

guarantees that it will conduct an evaluation at the conclusion of a project and not rely on inconsistent USAID benchmarks for M&E budget for projects that vary on a case-by-case basis. Two other respondents mentioned specific amounts budgeted by their agencies for M&E activities. One organization aims for five to seven percent of project budget for M&E activities in an effort to coordinate and plan for evaluations from the beginning phases of projects (7). Headquarters staff members at this organization currently are engaged in ongoing conversations with country directors about budgets. M&E coordinators also work with financial teams to budget per activity to make sure that the agency has M&E costs as part of institutional knowledge that staff can easily access for quick proposal turnaround. One respondent conveyed that even with targets to allocate five to ten percent of project budget to M&E, headquarters and country staff negotiate the final budgeted amount (4). The respondent also mentioned that the agency remains unclear regarding how USAID Forward will impact that budgeted amount.

Develop M&E field staff and local partner capacity

A broad range of capabilities and sophistication of local evaluation partners that varies by country often makes local partnerships challenging. Educating field staff ensures they have the knowledge to identify qualified local partners and to monitor the activities of hired local partners. Field staff may recruit better partners, and provide more oversight and management of partnerships as a result. One respondent emphasized the need to monitor the quality of work contracted out, and to provide technical oversight to ensure the quality of data collection by local partners (3). M&E staff members at other organizations have found that training field staff to manage evaluations better and improve communication with local partners enhances M&E conducted through local partnerships (5). Exposing M&E officers to a basic understanding of evaluation aids field staff in identifying qualified local consultants. One agency now does more preparation of field staff for evaluations so that country offices can manage local partners, not just hire them. The agency has already created Modules I and II on how to create basic M&E reporting systems, and how to undertake data quality assessments. Module III—in progress and planned for issue in July of this year—will brief field staff on how to prepare for evaluations. The Module has already proven successful in South Africa, Swaziland, and Lesotho. One respondent cautioned that field staff still needs to carefully vet local consultants. While the decision to hire local staff happens locally, headquarters may provide second opinions as requested (8).

Another INGO provides each M&E specialist with a training package upon hire (6). The agency requests M&E specialists to join a Community of Practice and attend meetings every two to three months that include information about different topics such as data quality, global indicators, and databases in headquarters. The Community of Practice offers an avenue where staff may communicate and discuss issues, such as the need to define Terms of Reference for local consultants.

One respondent described the importance of also educating local partners, not just field staff, about M&E best practices to uphold donor and organizational

standards, and to promote the view of partnership as a collaborative, “mutual learning process (2).” Another agency involves local government and partners in the development and testing of M&E frameworks in an effort to design systems that can be implemented at scale within existing systems (3). Staff members try to consider scalability from the beginning and keep tactics simple, so that countries can maintain systems after a project ends. Agency staff members attempt to use and strengthen existing systems rather than develop new ones. Sharing of information with local partners also develops trust and relationships between them and implementing staff. Headquarters M&E staff at another organization also encourages field staff to network with local evaluation associations and peer agencies to identify qualified local partners to maintain M&E standards (1). Other INGOs make clear to consultants the level of analysis expected of them by including in the Terms of Reference data sets and list analyses (SBSS syntax) as deliverables. Setting clear Terms of Reference also makes evident to a country office what it should expect from local consultants (4,6). One respondent did not recommend outsourcing M&E to local partners because she perceives it as an integral, internal function to the agency (9).

A different respondent emphasized the importance of field staff having the capabilities to engage in real-time monitoring and adjustment of programs (2). Projects may go off track unexpectedly, and field staff and local partners need to have the ability to identify changes in project trajectory and adjust programs accordingly. Cultural sensitivity and awareness, enhanced by continuous communication between local staff and project managers, aid field staff in upholding the “do no harm” principle and keeping projects on track. Project managers may have regularly weekly or monthly meetings with local staff to check in on program progress and problems.

Another agency has encouraged a move away from capacity building of local staff, and encourages a culture of coaching and mentoring (7). The agency aims to empower individuals and to encourage “locally driven knowledge and locally driven M&E” by allowing local staff to engage in locally driven baseline and other reports. The organization encourages communication between local M&E coordinators amongst each other, rather than imposes solutions from above in a top-down approach. M&E regional calls bring together M&E regional coordinators once a month; different countries chair the meeting each month to build ownership of local capacity. Since the chair focuses the agenda, the onus of the meeting and resolving problems falls not on headquarters, but on all staff members. The organization trained M&E coordinators and local partners in Africa last year to make sure everyone had some comfort in conducting M&E activities. Headquarters staff also plays a major support role to country directors to make sure they know about best practices, and how to integrate a learning culture. Headquarters staff members also make sure country directors understand the importance of reflection meetings and have the necessary tools to facilitate reflection meetings.

One respondent hopes that her agency will measure M&E around building partners to demonstrate how the organization successfully builds capacity (1). The organization’s Framework includes local partners and aims for all of its local

partners to eventually use these tools. Coaching local partners and teaching them how to use these tools comprises a major component of its M&E activities. The respondent described the agency's commitment to EvalPartners, and current discussions trying to determine how to support the initiative.⁴⁸ The agency has discussed small-scale financial support for EvalPartners and invited representatives to meet with the agency's Board of Directors, but has not yet finalized the best role of the agency's support.

Conduct strategic evaluations to increase ownership and showcase results

Organizations that take the initiative to conduct internal impact evaluations promote ownership and increase the likelihood that implementers will incorporate evaluation results in program decision-making processes. One agency conducted a 10-year retrospective evaluation of its food programs internally, as a learning process and to showcase results (2). Internal evaluations should have a substantial reason for organizations to conduct them to legitimize costs. For example, an organization may have a new, successful method of implementation and would like to demonstrate program success to donors. The respondent from this organization believes that evaluations done at the initiative of INGOs tend to impress donors.

One respondent mentioned that her M&E team considers conducting final evaluations for pilot projects or larger projects when “[they] can learn something new” from the project, as a “proof concept (7).” The organization already has data on many programs that have proven impact, so monitoring suffices and saves limited resources.

Another organization conducts evaluations to see if a project works and to look at scalability and sustainability (3). The respondent discussed that the organization needs to see “promising results” through internal data before it launches an expensive impact evaluation. Staff conducts evaluations on a case-by-case basis. This organization may engage with an external evaluator to support M&E activities when insufficient capacity and conflict of interests pose challenges to conducting internal evaluations. Country offices or country managers then have the opportunity to write a management response to evaluation findings and publish their response as an annex to the report. Inclusion of internal perspectives on external evaluations promotes ownership of evaluation findings. The organization also publishes humanitarian and emergency response evaluations, and shares some evaluations with other networks.

Mixed quality of external evaluations has led another organization to develop its own Evaluation Policy to provide more guidance on the external evaluation process (9). According to the respondent, external evaluations often do not provide

48. EvalPartners. "The International Evaluation Partnership Initiative," accessed April 5, 2013, <http://www.mymande.org/evalpartners/the-international-evaluation-partnership-initiatives>.

organizations with the information that staff members seek. As a result, staff may get more out of internal evaluations because they better understand program objectives and activities. Inclusion of internal staff from other projects in evaluations minimizes conflict of interest. The respondent described how her organization tries to emphasize participatory approaches that develop capacity of local staff during evaluations. Headquarters defines the Scope of Work for consultancies, but does not participate in the evaluations. Rather the organization encourages local M&E teams to have an integral role during the evaluation process.

Similarly, another INGO brings in M&E staff from other countries to conduct evaluations (7). The organization trains its Institutional Learning Team in Evaluation Ethics, and thus considers its staff members competent to conduct evaluations of the organization. Bias, however, may result from internally conducted evaluations, and so the organization contracts out evaluations to external local or international firms. The organization has conducted one impact evaluation and has two outcome mapping processes going on currently. M&E staff members also look at OECD DAC criteria for guidance in evaluations.

M&E staff members at one INGO recognize the need to conduct internal evaluations. M&E staff members have spearheaded discussions within the organization regarding allocation of private funding for project baseline and endline evaluations currently conducted externally per donor requirements (8). Senior M&E staff members at the organization have also considered conducting ex-post evaluations one to two years after a project has closed. Ex-post evaluations would enable the organization to assess the impact and sustainability of interventions, but M&E staff members have not yet received approval for such evaluations. The M&E team has discussed the establishment of a separate unit to meet the need for different skills required for crosscutting meta-analysis versus monitoring of programs, to obtain “good enough” information to help the agency make decisions.

Leverage technologies

The World Wide Web increases the ease with which INGOs may share information and knowledge. One INGO hosts a web-based database maintained at headquarters where staff uploads Performance Management Plans for all projects—a “warehouse of PMPs (6).” Headquarters staff members use these data to prepare handouts for each project manager so s/he can observe project performance on a yearly basis. The database includes a summary table of indicators for each project. Headquarters staff presents data to management in the home office. Skype enables the organization to hold project reviews every six months for financial, procurement, technical, and M&E issues in Washington. During reviews, the chief of party, technical team, and Washington backstopping sit down and share information. The INGO started the reviews this year and has completed them for all 50 projects. This organization also aims for all projects to use geographic information system (GIS) technology to collect and record GPS coordinates of projects and then plot them on map (6). The organization has a GIS Specialist in Washington, DC to assist with the goal to have staff record and plot

GIS coordinates for all projects. The organization also hosts packages and training materials online such as SPSS and an Access database, and other resources.

A centralized database rather than multiple individual assessment and measurement tools allows for collection of data in a centralized and standardized way (5). Without that imposed standard for quality including standardization of core parts of the program in terms of method and data collection, country offices may not adhere to best practices. The easy-to-use database also enables staff to perform cross-country comparisons. Field offices often need help to build their own databases. A customizable, centralized database avoids the complications of building numerous project-specific databases. Staff at a different INGO is exploring meta-level data as an alternative to collecting too much data (1).

The web platform ClearSpace has enabled one INGO to create a Community of Practice around M&E (9). The organization uses ClearSpace to create a connected, web-based community agency-wide, with one platform specifically for M&E where employees can share questions, ideas, tools, best practices, and host live webinars monthly. Staff uses ClearSpace to share information from headquarters, conduct trainings, and have individuals from the field present findings on different topics. The respondent described how the platform promotes as much “peer to peer learning” and open dialogue as possible, and supports the relationship between headquarters and field M&E staff. Staff members have also considered ClearSpace as a successful tool over the years. Other INGOs have a Sharepoint platform where employees may post comments and materials to support communication and promote knowledge management and knowledge sharing between headquarters and field staff.

Another organization has created a website to share resources with other agencies, and to centralize information related to peace building and governance initiatives (7). M&E staff members encourage other agencies to post their evaluations on the website to support interagency learning, even if evaluations show projects have failed. Staff puts all evaluations online regardless of quality and content. The respondent remarked, “We believe it’s important to share lessons learned not just within [the organization], but also outside, with the entire world, because we really need to learn what’s going on, what’s working, what’s not working.”

Organizations have also leveraged technologies to create toolkits. One INGO has developed “D(design)M&E in a box:” a digital resource of recommended practices, tools, tips, data system models, and examples of good M&E (9). The interview respondent cites the Box as one of the organization’s primary M&E tools. The Box also supports and influences M&E practice in the field for an organization with a small headquarters team (four people). This INGO emphasizes making static resources available to individuals through DM&E in a Box, which came about in the mid-2000s. The impetus for the toolkit came from the field at an agency leadership meeting, where staff recognized the lack of good M&E practice in the field. The agency decided to provide more support and resources for M&E in the field, and a technical support team received the task of putting together a primer and toolkit on M&E. M&E staff rolled out the digital DM&E in a Box in each country to start better

practices of developing logframes and other M&E activities, and created a fresh M&E office with a newly hired director.

Use of mobile technologies has increased one INGO's capacity to collect data for evaluation purposes (5). The respondent characterized mobile data collection as a "no brainer" and stated, "everyone should do it" for quantitative surveys. In May 2012, this INGO conducted a baseline survey for orphans and vulnerable children program in Tanzania. Staff collected data from 1200 caregivers and 1200 children beneficiaries with the help of mobile phones. Staff also collected data from district social work officials and schools, and local partners using a fieldworker administered research and data collection suite called *Mobenzi Researcher*. Mobile phone data collection methods enabled the team to evaluate data one week after collection. The organization expanded use of mobile technology to Tanzania, Namibia, and plans to use it Myanmar, Thailand, and Nigeria. A traditional training culture among program and M&E officers demands formal training in use of mobile phones for evaluations; the organization has yet to conduct such training, but plans to do so in the near-term. Staff still struggles to use mobile technologies for monitoring purposes, and has had greater success in using phones for evaluation purposes. An imminent Technology Strategy Paper will outline how mobile technology will link with the organization's centralized database system with geographic information system usage.

RECOMMENDATION

The best practices outlined in this report offer methods that IRD may implement to improve its own M&E activities, to support organizational objectives, enhance programming, and increase funding:

- **Define M&E staff responsibilities in an agency-wide M&E framework.** An organizational strategy that defines M&E staff responsibilities facilitates staff cooperation and increases the consistency and quality of M&E activities. The framework constitutes a key component of a broader mission and learning plan that enables agencies to strengthen the evidentiary base of their programs.
- **Promote M&E learning at the organizational level.** Reflective learning loops enable staff members to integrate lessons learned into program design at the project, regional, sector, and organizational levels. Through knowledge sharing, agencies can draw on evidence of what works and what does not, as part of a learning process that enables the organization to adapt project implementation to achieve better results more quickly and sustainably. Effective monitoring of projects ensures that program goals align with agency objectives. Upper management support for staff performance evaluations allows the agency to hold employees accountable for M&E responsibilities.

- **Allocate sufficient time and resources for M&E in project design.** Providing sufficient resources during the early stages of projects makes M&E more effective, more efficient, and more useful. By budgeting for evaluations, the agency guarantees that it will conduct evaluations at the conclusion of projects as needed for learning purposes.
- **Develop M&E field staff and local partner capacity.** Educating field staff ensures they have the knowledge to identify qualified local partners and to monitor the activities of hired local partners. Involving local government and partners in the development and testing of M&E frameworks promotes scalable systems.
- **Conduct strategic impact evaluations.** Organizations that take the initiative to conduct internal impact evaluations promote ownership and increase the likelihood that implementers will incorporate evaluation results in program decision-making processes. Ex-post evaluations enable the agency to assess the long-term impact and sustainability of interventions, and demonstrate results to donors.
- **Leverage technologies.** Online technologies facilitate sharing of information and knowledge within and between agencies. Web-based platforms support communication of questions, ideas, online toolkits, and best practices. Mobile technologies can expedite and simplify M&E processes, and increase data quality.

USAID Forward offers an impetus for IRD to strategically align its M&E activities with organizational mission, in order to achieve better outcomes and results. INGOs continue to face a number of challenges in implementation of M&E as explained in this report. Yet functioning M&E systems enable INGOs to better achieve mission, improve programs, and attract resources, at the program and agency levels, as shown in Table 2.

Table 2. Agency and Program-Level Benefits of M&E

	Achieve Mission	Improve Programs	Attract Resources
Program-Level M&E	Determine impact at program level and contribution towards organizational mission	Strategically allocate resources within programs to deepen impact	Demonstrate program results to attract resources in specific sector and/or from specific donor
Agency-Level M&E	Determine impact at agency level and evaluate overall progress towards mission	Strategically allocate resources across agency to deepen impact	Demonstrate organization results to attract further resources to agency as a whole

Source: Walker and Hemberger. *Agency-Level Measurement: Continuing the Conversation*.

Observations

USAID Forward and the international community's emphasis on building local partner capacity still raises questions regarding the role of implementing agencies in development assistance. As evidenced by the interviews, some organizations focus on capacity building by implementing scalable projects, including local partners in project design, and sharing of information and lessons learned. Still, the Obama administration's commitment "to ultimately support long-term, sustained progress and make assistance unnecessary in the long term" threatens the existing function of INGOs in the development field.⁴⁹

As one interviewee mentioned, implementers feel the need to defend their "value add" in supporting local partners to demonstrate why USAID Forward's objectives may not provide the best solutions for increasing aid effectiveness. IRD may join international INGO advocacy efforts, such as working groups, to influence USAID's decision-making processes, so that USAID's future policies better align with M&E best practices as seen by implementing agencies. Appendix C includes a list of additional resources where interview respondents share and find information regarding M&E best practices. INGOs have expertise in implementing aid that they can leverage when working with local partners. M&E provides the critical tool that enables organizations to continue to promote knowledge of development best practices.

49. U.S. Department of State. *Leading through Civilian Power: The First Quadrennial Diplomacy and Development Review*, 94.

Interviews

- 1) Telephone interview with M&E Director, February 12, 2013
- 2) Telephone interview with M&E consultant, February 12, 2013
- 3) Telephone interview with M&E Specialist, February 12, 2013
- 4) Telephone interview with M&E Director, March 7, 2013
- 5) Telephone interview with M&E Director, March 28, 2013
- 6) Telephone interview with Senior M&E Director, March 1, 2013
- 7) Telephone interview with M&E Specialist, March 4, 2013
- 8) Telephone interview with Senior M&E Advisor, March 7, 2013
- 9) Telephone interview with M&E Director, March 7, 2013

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Appendix A: Participating Organizations

- ACDI/VOCA
- Catholic Relief Services
- International Relief and Development
- Lutheran World Relief
- Mercy Corps
- PactWorld
- Save the Children
- Search for Common Ground

Appendix B: Key Informant Interview Question Guide

OPENING STATEMENT

Good morning/afternoon. Thank you for agreeing to participate in this interview today. My name is Katherine White, and I am a second-year Master of Public Policy student at Duke University. I am conducting research for my client, International Relief and Development on non-governmental organizations' monitoring and evaluation best practices.

As you may already know, the United States Agency for International Development (USAID) implemented a new reform agenda in 2010, known as USAID Forward, developed as a part of the Obama Administration's first Quadrennial Diplomacy and Development Review.

The purpose of this study is to determine best practices of development NGOs in implementing M&E, within the context of USAID Forward's Evaluation Policy. I am interested in learning about M&E at the organizational level and at the project level, as well as understanding general M&E processes at your organization. This information will be used to create a best practices guide for the client on M&E systems. The guide will not be distributed publicly, but I am happy to share my findings with organizations that participate in this study. Information disclosed by you will remain anonymous and will not be attributed to your organization. Would you like to continue to participate in this research? Do you have any questions before we proceed with the interview?

QUESTIONS

Section 1: Organizational level

- Q1. What is (are) the primary source(s) of funding for your organization?
- Q2. What is the average size of your projects/programs (\$)?
- Q3. What are the main sectors in which your organization works?
- Q4. Does your organization have an agency-wide M&E policy, in regards to data management, indicators, evaluations, or other M&E practices?
 - IF YES, What is the policy? Could you tell me how your M&E activities align with your organization's mission?
 - IF NO, what challenges does your organization face in implementing agency-wide M&E? How important/useful do you find it to have an agency-wide M&E policy?
- Q5. Could you please tell me how your organization uses M&E as a management tool at the project and institutional level?

Section 2: General processes

- Q6. In general, which M&E practices work best and which M&E practices would you recommend to other NGOs? Please give examples of each practice in action.

- Which M&E practices would you NOT recommend to other NGOs?
- Q7. Could you tell me about the relationship between HQ M&E staff and field M&E staff? What are the respective responsibilities of HQ and field M&E staff?
- Q8. Given that there may be challenges in the relationship between headquarters and field M&E staff, how do staff members address those challenges?
- Q9. Could you please tell me about your organization's experience in working with local consultants/firms to conduct M&E activities? Given that there are challenges working with local partners what practices make collaborations work as best as possible?
- Q10. What kind of evaluations does your organization conduct internally and externally? What are some of the challenges that you have encountered during the evaluation process, whether you have implemented or managed evaluations? How have you overcome those challenges?
- Q11. Is your organization changing its M&E practices in response to USAID's new evaluation policy? In what ways has USAID Forward's Evaluation Policy affected M&E at your NGO?
- Q12. From where do you obtain information or resources about successful M&E efforts and best practices?

Is there anything else that you would like to tell me that we did not cover during this interview?

Is there anyone that you would recommend that I speak with regarding this topic?

May I contact you if I have questions concerning any of the information you shared with me today? Please contact me at my email address kfw7@duke.edu for questions, concerns, or to share additional information.

Thank you for your time today.

Appendix C: M&E Resources

- American Evaluation Association monthly journal and evaluation advisory groups
- Baltimore Evaluators Working Group
- BetterEvaluation.org
- CRS "Preparing for an Evaluation" guide
- Field experience
- Google
- InterAction working groups
- LinkedIn M&E listserv and forums
- M&E newsletter
- MEASURE Evaluation website
- mymande.org
- Peers in the field
- Program Evaluation: Alternative Approaches and Practical Guidelines
- USAID Development Experience Clearinghouse (DEC)
- USAID Evaluation Policy
- USAID KDID knowledge management resources
- USAID PMEP Guide
- W.K. Kellogg Foundation Logic Model Development Guide
- Washington Evaluators Working Group
- Webinars
- Working groups across thematic levels at other agencies