

Monitoring and Evaluating Employment and Vocational Training schemes – Workshop organized under CMI's Employment and Social Protection program

Roles and Responsibilities in M&E

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Contents

- 1. General view
- 2. Roles and responsibilities in program monitoring
- 3. Roles and responsibilities in program evaluation
- 4. How to get there? How to ensure the sustainability of the M&E system? Roles and responsibilities in the institutionalization of M&E
- 5. Quick review main ideas



• Developing at the planning stage the results framework of the program is essential for ensuring that the aimed goals are achieved

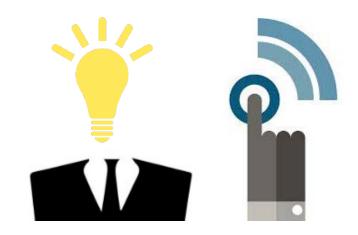
Results	Indicators	Baseline	Target	Means of verif.	Risks and assumptions
Impact statement (Ultimate benefits for target population)	Measure of progress against impact				Assumptions made from outcome to impact. Risks that impact will not be achieved.
Outcome statement (aimed <i>effects</i> –e.g. on the behavior of the target population)	Measure of progress against outcome				Assumptions made from outputs to outcome. Risks that outcome will not be achieved.
Outputs (Products and services –tangible and intangible–delivered or provided)	Measure of progress against output				Assumptions made from activities to outputs. Risks that outputs may not be produced.
Activities (Tasks undertaken in order to produce research outputs)	Milestones or key targets for production of outputs				Preconditions for implementation of activities.

Based on: PNUD (2009)

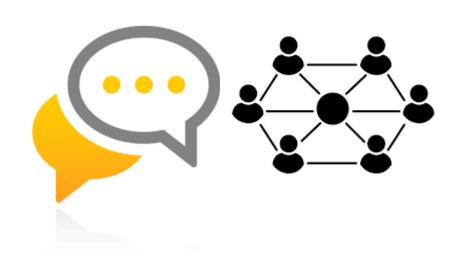




- A sound M&E system offers the opportunity:
- To better understand and to learn in order to inform decisions that may contribute to improve program implementation and the achievement of results; and



 To strengthen dialogue and to improve coordination among stakeholders and other partners based on common practices and the evidence available







Monitoring and evaluation are two integral parts of the same results-based system.

Monitoring and evaluation...

- Have different goals and need to be programmed, organized and implemented differently; and
- Have complementary roles:
 - Monitoring tells what happens and evaluation may help us understand why things happen that way;
 - Sound monitoring is **critical** for good evaluation.







Complementary roles of monitoring and evaluation for results

Evaluation

- MonitoringClarifies program objectives;
- **Links** activities and their resources to objectives;
- Translates objectives into performance indicators and sets targets;
- Routinely collects data on these indicators, and compares actual results with targets;
- Reports progress to managers and alerts them of problems.

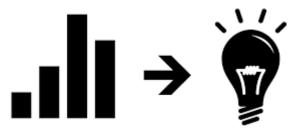
- Analyzes why intended results were or were not achieved;
- Assesses specific causal contributions of activities to results;
- Examines implementation process;
- Explores unintended results;
- Provides lessons, highlights significant accomplishment or program potential, and offers recommendations for improvement.

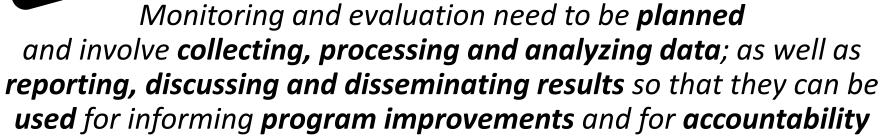
Source: Kusek & Rist (2004)















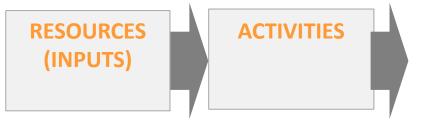








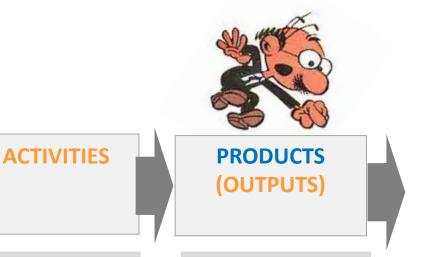
Monitoring takes place at different result levels:



Financial,
human, and
other
resources
mobilized to
support
activities

Actions taken or work performed to convert inputs into specific outputs

- Monitoring takes place at different result levels:
 - Product-level: good and services delivered by the program



Financial, human, and other resources mobilized to support activities

RESOURCES

(INPUTS)

Actions taken or work performed to convert inputs into specific outputs

Project
deliverables
within the
control of
implementing
agency
—SUPPLY SIDE—



- Monitoring takes place at different result levels:
 - Product-level: good and services delivered by the program;
 - Effect-level: changes triggered on target population's behavior/perception/values



ACTIVITIES

PRODUCTS (OUTPUTS)

MEDIUM-TERM
OUTCOMES
(EFFECTS)

Financial, human, and other resources mobilized to support activities Actions taken or work performed to convert inputs into specific outputs

Project
deliverables
within the
control of
implementing
agency
—SUPPLY SIDE—

Use of outputs by beneficiaries and stakeholders outside the control of implementing agency

-DEMAND SIDE-



- Monitoring takes place at different result levels:
 - Product-level: good and services delivered by the program;
 - Effect-level: changes triggered on target population's behavior/perception/values;
 - Impact-level: changes the program contributes to generate/enhance in the economy/society as a whole.

RESOURCES (INPUTS)

ACTIVITIES

PRODUCTS (OUTPUTS)

MEDIUM-TERM OUTCOMES (EFFECTS)

OUTCOMES (IMPACTS)

Financial,
human, and
other
resources
mobilized to
support
activities

Actions taken or work performed to convert inputs into specific outputs

Project
deliverables
within the
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—SUPPLY SIDE—

Use of outputs by beneficiaries and stakeholders outside the control of implementing agency

-DEMAND SIDE-

Changes in outcomes that that the program has contributed to trigger



- There are specific individual and collective monitoring responsibilities at each level for the implementing agency and for partner organizations.
 - While some monitoring functions can be assigned to specific entities or functionaries, such as project managers at the project or output level, monitoring responsibilities at outcome and higher result levels are collective efforts.
- Developing a M&E plan is needed for:
 - Establishing individual and organizational responsibilities; and for
 - Clarifying links between activities and expected results so that, at each level, staff have a clear "line of sight" into, or understanding about, each of the other levels and how they relate to one another.



Senior management of implementing agency

Ensure, in collaboration with partners, results-based and active management in the implementing agency

Thematic / operational experts

Provide advice and quality control

Internal and external partners

Contribute to goal setting and to the definition of expected results. Actively collaborate for designing and implementing the M&E system.

Program director

Ensure that program results are monitored. Use information collected through monitoring to inform program discussion.

Agency-level M&E committee

Establish, coordinate and promote collaboration within the M&E system.

M&E officer for the program

Monitor program results (effects and impacts). Alert of problems.

M&E officer for the project

Monitor the results of projects and alert of problems. Contribute to the monitoring of program effects and impacts, in collaboration with partners.

M&E officers of other projects and programs

Monitor the results of other projects and programs.
Alert of problems.
Share information.

Program beneficiaries

Contribute to goal setting and to the definition of expected results. Inform about satisfaction and utilization of products delivered by the project.

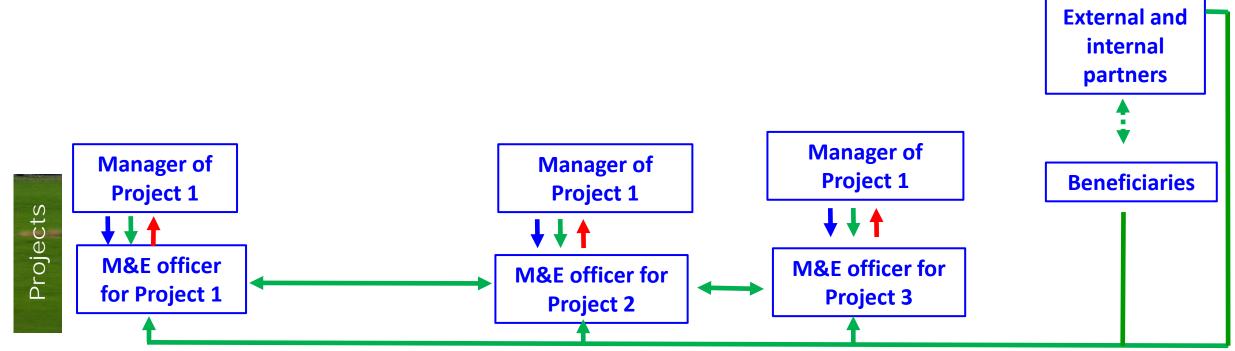
Project manager / coordinator

Place the project in a broader context by communicating with partners and beneficiaries. Ensure project monitoring.

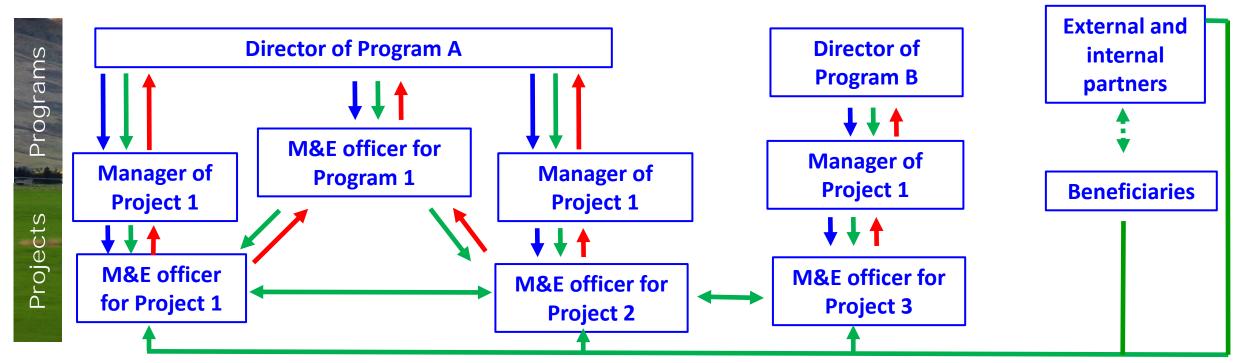


Let's see it step by step...

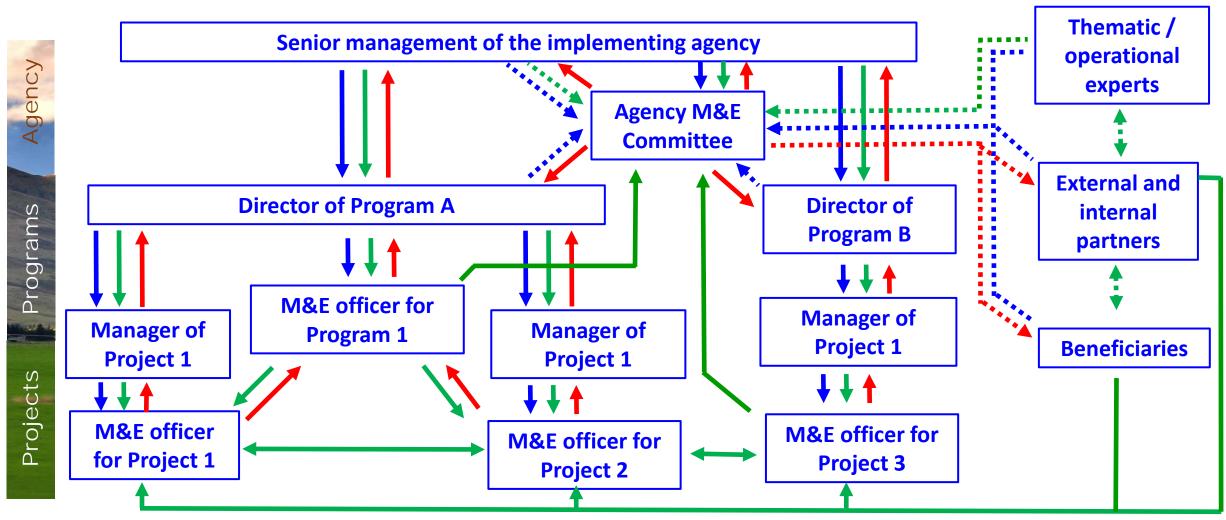








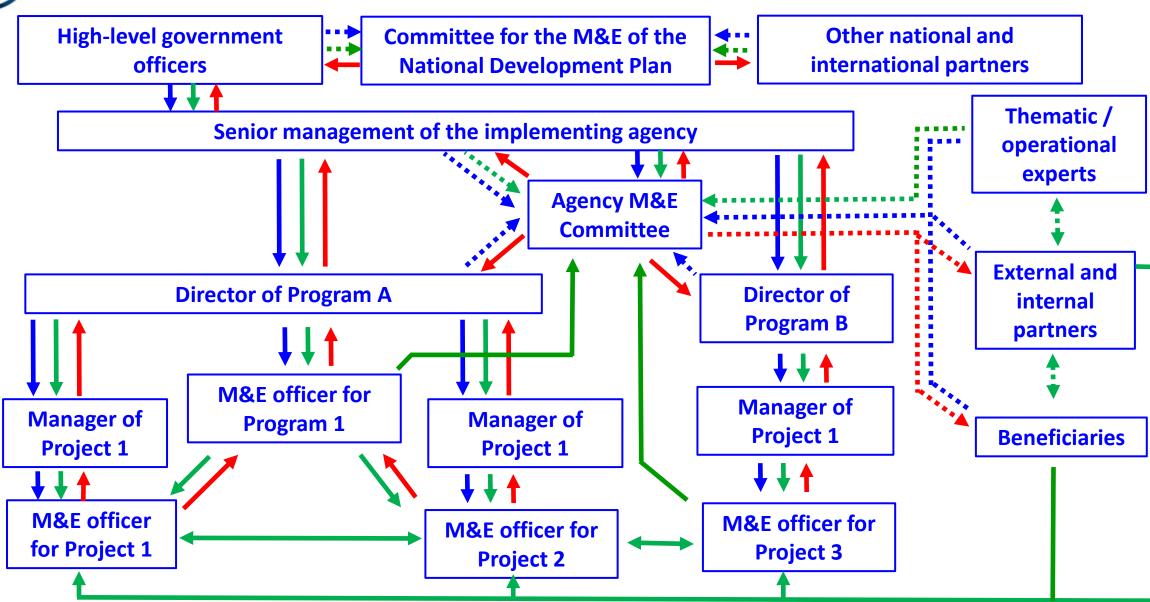




Agency

Programs

Projects







Tips for defining the roles and responsibilities of M&E units: common mistakes



- Being too ambitious –i.e. by trying to collect too much information or by trying to address too many questions:
- Being perfectionist –i.e. establishing an M&E system that is so complex that only works on paper;
- Loose perspective and become isolated in the system.
 - When we not know what other monitoring partners are doing (what their contributions to the system are, and what their information needs are), monitoring becomes a unidirectional practice in which we demand data and we report results "to others";
- Promoting the utilization of only certain methods, instead of encouraging the most suitable method to be chose in each specific situation;
- Limit the dissemination of results to the publication of monitoring and evaluation reports instead of actively promoting knowledge sharing and utilization;
- Forget the importance of using the M&E plan in a flexible way –i.e. by not adapting to changes in priorities or in the evolution of policy/program context.



Tips for defining the roles and responsibilities of M&E units: recommendations

- Elaborate an M&E plan and systematically develop M&E frameworks for projects:
 - Be clear on the M&E priorities and on who needs what information.
 - Keep it simple. Select a <u>small number</u> of indicators so that they can be <u>well</u> monitored;
 - \rightarrow Do not collect data unless you have an idea of what the information may be used for;
 - Identify M&E capacity building needs in the implementing agency and partners;
- During the implementation of the M&E plan:
 - Pilot indicators and data collection instruments before rolling them out on the entire system;
 - Meet regularly with key stakeholders and partners to collect data and to check whether they
 are finding useful the information provided by the M&E system.
- Program periodic meetings with senior management for reporting and discussing results; and be creative by tailoring reporting formats to the needs of managers, policy makers, academia...
- Combine rigor and flexibility: assess regularly whether the M&E framework is pertinent given the last changes in development priorities and in the context.

Based on: Timreck (2003); MAEC (2007); PNUD (2009)

Who: Actors and Accountability	What: Roles and Responsibilities	How: Timing and Methodology
National authorities Main responsibilities: Lead and oversee national programmes to determine progress towards intended results Identify and manage partnerships	 Monitoring for programme level results To ensure nationally owned results-based monitoring and evaluation To provide clear basis for decision making and guide development initiatives To use partner monitoring systems based on their comparative advantages To link results with resources and ensure accountability in the use of resources To ensure quality and the appropriate use of monitoring evidence and lessons learned To resolve key bottlenecks to implementation in order to improve the chances of achieving results (outcomes) 	 1. At initial planning stages Through active participation in development and approval of M&E frameworks for national programmes and UNDAF 2. Annual reviews (of progress towards results) by Reviewing progress, issues, and trends in the achievement of results given in documents for the annual review Making decisions on changes as needed Approving future work including M&E tasks Participating in joint monitoring (selectively as decided by prior agreement with partners)

Source: PNUD (2009)

Who: Actors and Accountability	What: Roles and Responsibilities	How: Timing and Methodology	
Senior managers of UNDP programmes Main responsibilities: Lead, implement and monitor the progress of country programmes, together with governments, UN organizations and other partners Collaborate with national partners to determine the focus and intended results of UNDP assistance to the country Identify and manage partnerships	 Monitoring for programme level results To forge strong coalitions for results To provide clear basis for decision making and guide development initiatives To ensure active and results-based monitoring To ensure quality and the appropriate use of monitoring evidence and lessons learned To resolve key bottlenecks to implementation in order to improve the chances of achieving results (outcomes) To link results with resources and ensure accountability in the use of resources To adjust UNDP assistance in view of emerging changes as 	 At initial planning stages Through active participation in the development and approval of M&E framework Participate in joint monitoring (see above) Prior to annual reviews by Determining strategic contribution being made by programme towards results through review of outcome group reviews and Annual Project Reports Deciding on strategic changes needed in programme results and resources, if needed Finalizing evidence-based contribution of programme as a whole to annual review Participate in annual reviews 	

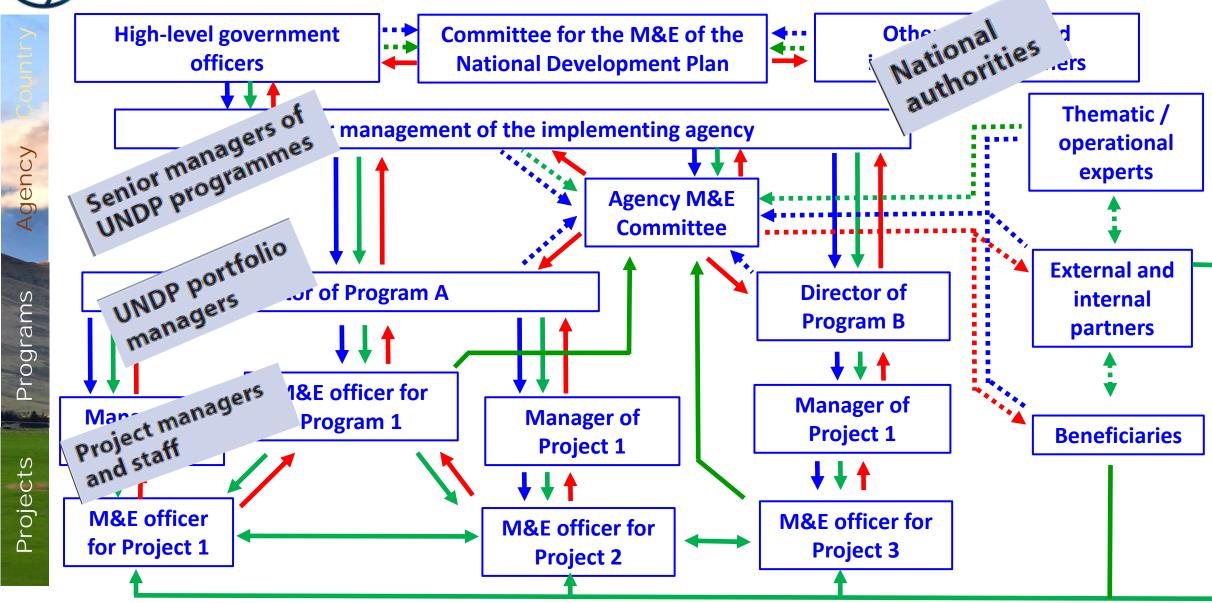
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Who: Actors and Accountability	What: Roles and Responsibilities	How: Timing and Methodology	
 UNDP portfolio managers Main responsibilities: Contribute to sectoral/outcome level coordination mechanisms Manage UNDP portfolio of programmes and projects in a thematic area such as governance or poverty, in other words, UNDP contribution to outcomes 	 At outcome level To analyse progress towards achievement of outcomes To assess the efficacy of partnership strategies and take related actions (e.g., better coordination with partners) To monitor the effectiveness of implementation strategies in tackling the constraints to the achievement of results (outcomes) and take related actions To ensure effective use of resources, deploying them to maximize the possibility of achieving results (outcomes) To discern and promote capacity development in monitoring and evaluation 	 1. At initial planning stages Through active participation in development and approval of M&E framework for respective outcomes 2. Throughout programme cycle by carrying out monitoring activities and joint monitoring 3. Prior to annual reviews by determining: Progress towards the achievement of outcomes Progress of the partnership strategies for achieving outcomes Rate and efficiency of resource use Issues that require decisions at the annual reviews 	

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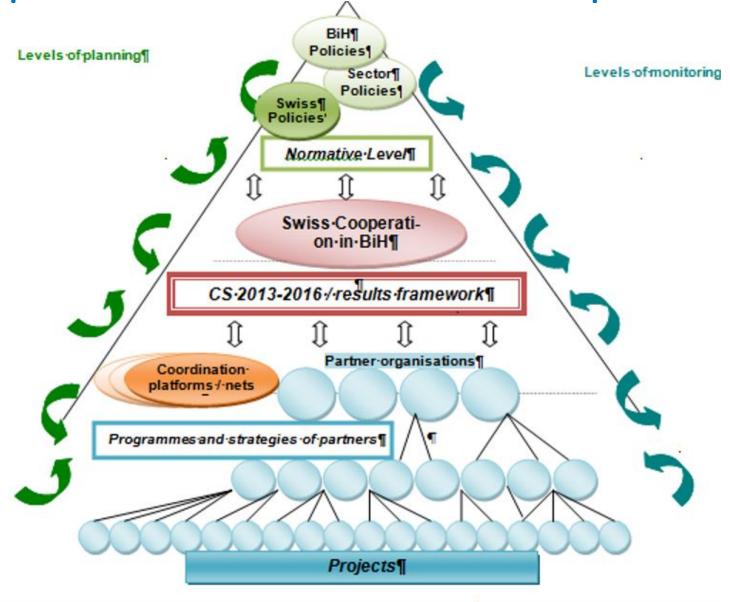
Who: Actors and Accountability	What: Roles and Responsibilities	How: Timing and Methodology
Project managers and staff Main responsibilities: Manage UNDP-assisted projects to help produce outputs Contribute to project management and project performance	 At project level, monitoring outputs To ground the project in the larger context To take steps towards achieving output targets To ensure effective collaboration with partners To interface with beneficiaries To ensure efficient use of resources To feed information of project data to higher level monitoring (outcome and programme-level monitoring) 	 1. At initial planning stages Development of and agreement on M&E framework for project through an inclusive process 2. Throughout programme cycle by carrying out monitoring activities connected with the project 3. Prior to annual reviews by determining: Progress towards the achievement of outputs and contribution related outcomes Rate and efficiency of resource use Issues that require decisions at the annual reviews Inputs to programme reviews and annual reviews in the Annual Project Reports

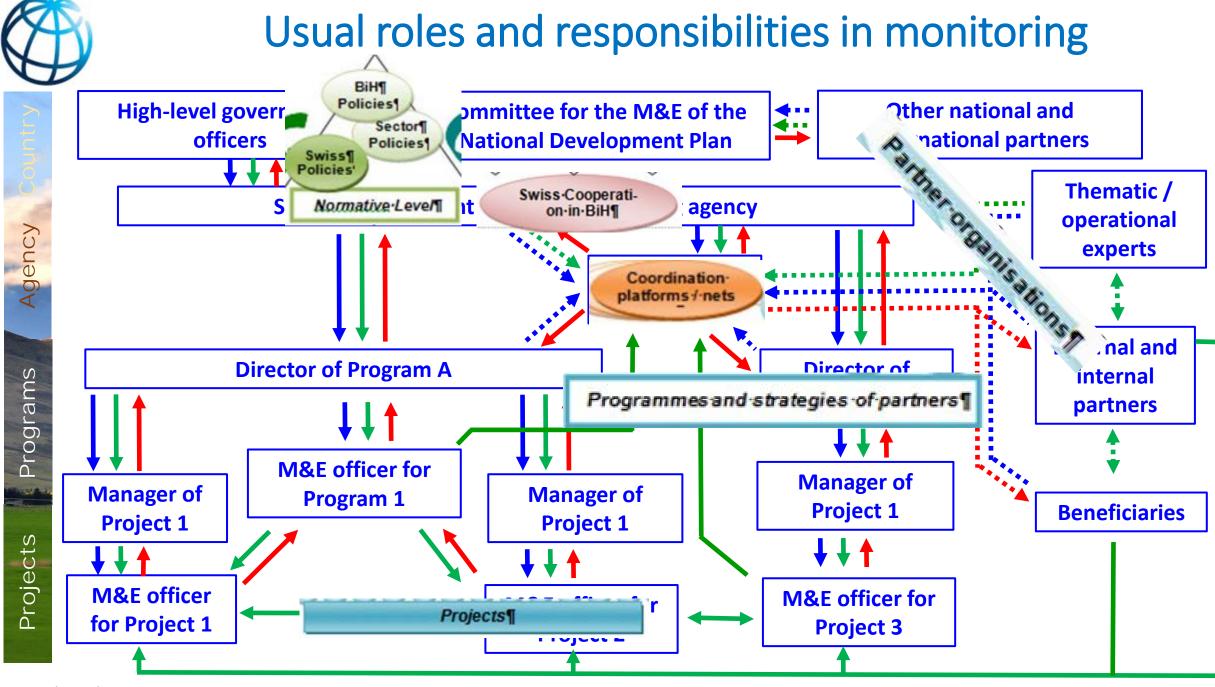
Source: PNUD (2009)





- Example 2: M&E in the Swiss Development Cooperation





3. Roles and responsibilities in program evaluation





Usual roles and responsibilities in evaluation

Senior management of implementing agency

Promote in the agency the evaluation function and the utilization of results

Internal and external partners

Contribute to defining the object of evaluation and to results dissemination

Evaluation and thematic experts

Provide advice for improving the quality of the study. Contribute to disseminating results

Beneficiaries of the program

Bring their perspective. Provide information.

Program director

Responsible for the program object of evaluation. Owner of the evaluation.



Steering group

Management support and supervision of the evaluation process

Reference group

Quality control and results dissemination. *Critical friends* role.

Other key actors involved

Bring their perspective. Provide information.

Contribute to results dissemination.

Project manager

Responsible for implementing the project and for programming and supporting the evaluation.



Evaluation manager

Responsible for putting together the evaluation team, and for facilitating and overseeing their work



Responsible for conducting the study

Internal vs. external

Individuals vs. Firms

(No little visual break here)





Internal evaluation vs. External evaluation

Avantages de l'évaluation externe

- Strengthens the credibility of the evaluation project from an accountability perspective by underpinning the independence, objectivity and transparency of the process;
- Optimizes use of scarce human resources and brings in expertise, which might not be available in the organization.

Avantages de l'évaluation interne

- Supports directly organizational learning;
- Mobilizes available in-house knowledge;
- Facilitates direct feedback into the design of an intervention;
- Can be carried out whenever financial resources are limited.



Selecting evaluators: individuals vs. firms

Individuals

- The variety of backgrounds of individual team members contributes to **debate** and **discussion** that can enrich the exercise –but also increase the risk of internal conflicts that can affect progress;
- The contracting process normally is faster –but identifying individual consultants may take time.
- Services provided by individual consultants may be less expensive.
- **Logistics** to be provided by the commissioning unit.
- Individual consultants may be more amenable to changes in the ToR or other arrangements –but changes in the schedule can result in additional costs in fees, per diem and travel arrangements.
- The **sudden unavailability** (e.g., illness) of an individual evaluator may affect the timely completion of the study.

Firms

- Members of the team are used to working together.
- The firm assures the **quality** of the products.
- **Bidding procedures** can be lengthy and cumbersome.
- The fees may be higher, as the firm's overhead will be included.
- The firm develops the methodology or proposal for the evaluation, and is responsible for providing the logistics needed for the evaluation.
- Fees are agreed as a package that is unlikely to vary, unless there is a change in the ToR;
- In the event of sudden unavailability of an evaluator, the firm is responsible for providing a substitute.



Tips for managing evaluations: common mistakes

- Starting de evaluation process without having sufficiently discussed and agreed with all key stakeholders and partners what is expected of the evaluation;
 - Forgetting the expectations agreed during the implementation of the study, or in discussion of evaluation results;
- Expecting that the principal evaluator or other key stakeholders or partners would take decisions or actions beyond their responsibilities;
- Taking too long in: (i) Making decisions; (ii) Responding to advice/feedback requests made by the evaluation team; (iii) Reviewing evaluation reports; or (iv) Making the payments agreed once the corresponding deliverables have been received;
- Not asking questions to the evaluators –i.e. when they seem "too basic" or " too technical";
- Starting to implement the evaluation without having agreed with all key actors involved and
 with the evaluation team suitable communication channels and protocols, or without having
 granted evaluators the access to information sources they need to perform their job.
- Not planning or delaying the meetings planned for reporting the evaluation results and for discussing its conclusions and recommendations with interested parties.



Tips for managing evaluations: recommendations

 Promote ownership by timely taking the decisions required at each stage of the evaluation process;



- Discuss with all key stakeholders and partners what they expect of the evaluation,
 and agree with them a set of common expectations before starting the evaluation;
- Monitor progress in the evaluation work and provide timely and pertinent feedback as needed;
- Ask all the questions you need to the evaluation team (no matter how "basic" they seem) and,
 in the event that problems are detected, be open to their suggestions about possible solutions;
- As early in the evaluation process as possible:
 - Discuss and agree with the evaluation team communication protocols and channels –both formal and informal;
 - Ensure evaluators access to the information sources they need for conducting the study;
- Meet with the evaluation team and with other key actors and discuss with them the drafts and the final version of the evaluation report;
- Plan ahead meetings for presenting the evaluation results to managers and to other interested
 parties.

 Based on: Timreck (2003); MAEC (2007); PNUD (2009)



Tips for writing the Terms of Reference (ToR) of an evaluation: common mistakes

- Establish evaluation goals that are not realistic:
 - Too many questions or questions that are too complex for available resources and time;
- Unclear or vague ToR;
- Too detailed ToR may limit the **flexibility** that the evaluation team needs for adapting to the changes in the context or in the information needs of the program;
- Launch the call for proposals for conducting the evaluation in the last minute:
 - Good evaluators plan their work ahead of time and are not usually available for imminent collaborations;
- Evaluation timeline is not well synchronized with the program timeline.



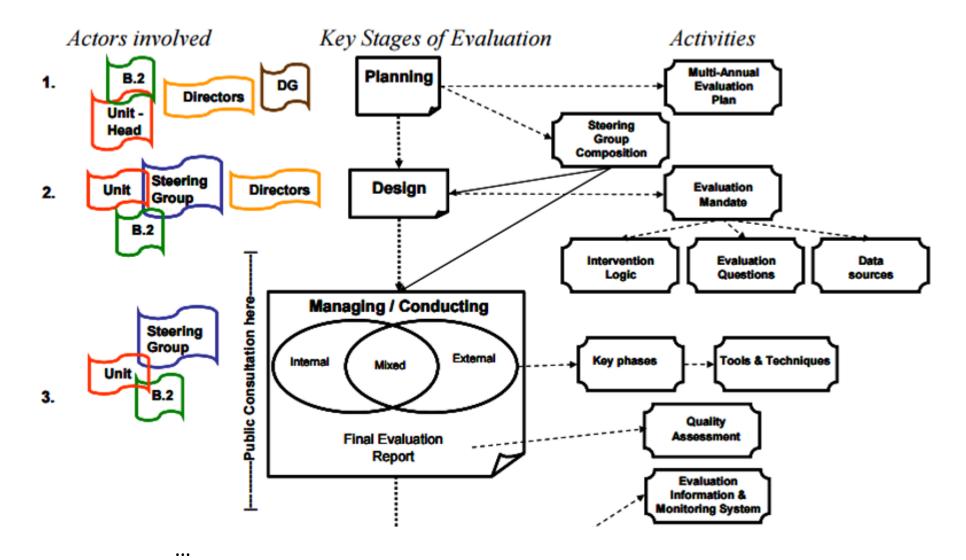
Tips for writing the Terms of Reference (ToR) of an evaluation: recommendations

- State clearly the objectives of the evaluation and identify the following:
 - General issues and preliminary evaluation questions to be addressed;
 - Key stakeholders and their expected uses of the evaluation;
 - Overall evaluation approach to be adopted;
 - Products expected from the evaluation;
 - Expertise required from members of the evaluation team; and logistical arrangements.
- Avoid technical jargon –e.g. acronyms when stating the evaluation expectations and objectives. Be clear on how the evaluation is expected to help the organization.
- Focus on preliminary questions to be addressed.
- Avoid choosing too many questions. It is better to have an evaluation examine a few issues in depth than to look into a broad range of issues superficially.
- Include all stages of the evaluation process in the evaluation timeline –including expected delivery dates and specific activities for the reporting/discussion of results.





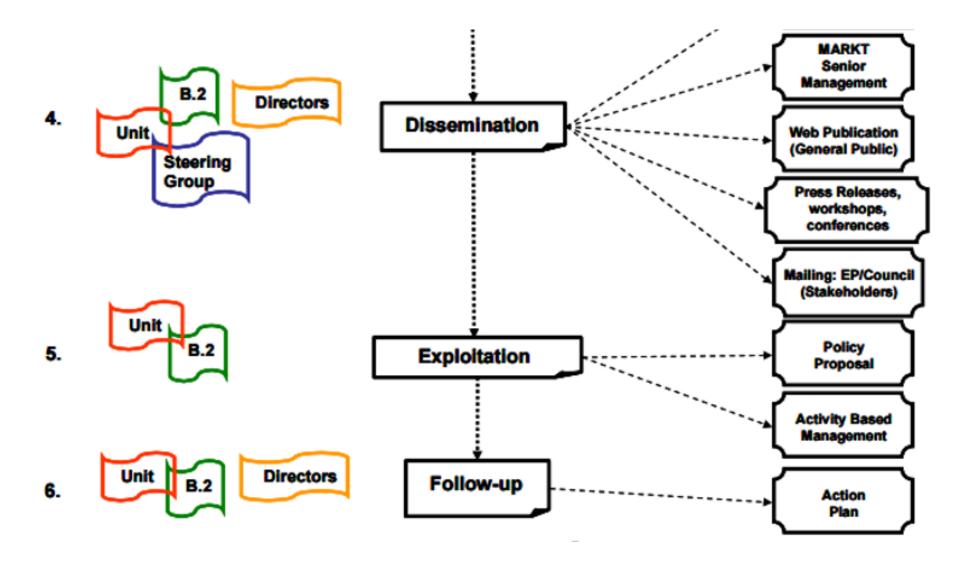
Roles and responsibilities in program evaluation – Example 1: European Commission



Source: EC (2008)



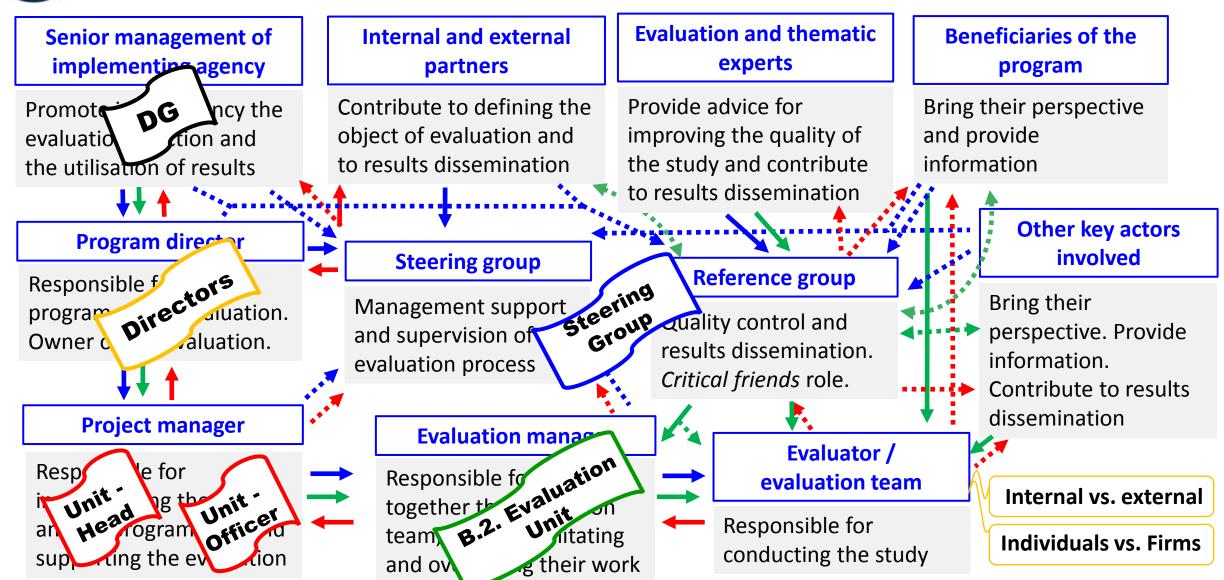
Roles and responsibilities in program evaluation – Example 1: European Commission



Source: EC (2008)



Usual roles and responsibilities in evaluation



Source: The author

4. Roles and responsibilities in the institutionalization of M&E

What is institutionalizing M&E?

The M&E function is considered to be institutionalized in a country when...

- M&E is integrated in the policy and program cycles, and M&E activities are programmed –units responsible for M&E have sufficient human and budget resources allocated for successfully performing their job;
- M&E is mandatory –the decision of conducting M&E is not discretionary;
- M&E is extensively practiced in government agencies —it is not limited to certain priority programs and/or sectors;
- Decisions to evaluate are based on pre-established criteria more generally, the offer of evaluations is not only determined by specific information requests;
- The M&E function is legally established/regulated;
- M&E tasks are performed by qualified experts who meet professional standards;
- The information and recommendations emanating of the M&E system are used for decision making by managers and policy makers.



- Building and sustaining results-based M&E systems requires continuous commitment, time, effort, and resources;
- There are political, organizational, and technical challenges to overcome:
 - «Primarily a political process, and less so a technical one»
 - Political champions highly placed in the government who are committed to change towards results-based management can help overcome such challenges.
- On the technical side it is important:
 - To develop sound statistical systems so that they can provide the data that are needed for M&E;
 - To encourage results dissemination and knowledge sharing:
 - → "Little champions" are also essential on the technical level for developing and consolidating M&E communities of practice.



Senior government officials

Overall "champion" for the drive for results-based M&E in the public sector

Central agency
(e.g. Ministry of
Finance, Ministry for
Planning)

- "Champion and facilitator for M&E development and implementation in all ministries;
- Lead in the development of a national performance framework;
- Government policy center for M&E: guidance and guidelines for performance measurement, monitoring, evaluation and reporting to all other actors in the system;
- Oversight and quality control role for all M&E performance measurement and reporting;
- Facilitate or manage high-level evaluations or special studies on priority areas;
- Advise senior government officials on all M&E matters;
- Provide and/or promote M&E capacity building initiatives: workshops, training, etc;
- Promote the professionalization of M&E and facilitate the development of M&E communities of practice.

Other ministries and implementing agencies

- Establish internal M&E units and groups for supporting and overseeing M&E initiatives;
- Develop performance frameworks liniking ministry programs with sector goals;
- Conduct thematic evaluations on each ministry's policy area and key programs;
- Report sector-level results and participate in policy formulation and budgetary discussions.

Based on: Karkara (2013), EUROsociAL (2015)



High-level M&E committee

- Determine priorities for the conducting of high-level evaluation or special studies;
- Provide a forum for review of findings and decisions for follow-up;
- Oversight role over the pace of national evaluation capacity development.

Parliament

- Central role in ensuring the accountability of government to citizens;
- Demand and use the information emanating of the M&E system for informing the discussion of parliamentary committees –i.e. the budgetary discussion in parliament;
- Develop new legislation in favor of results-based management as needed.

Auditor General

• Potential oversight role (audits on quality of data, quality of results reporting, etc).

National statistical agency

- Conduct national surveys and provide guidance to ministries in data collection;
- Focal point for the national data development strategy.

Training institutions

 Universities and other training institutions can contribute to strengthening the national M&E capacity in the public sector.

Based on: Karkara (2013), EUROsociAL (2015)



Civil society

- Collaborate with central agency for establishing feedback and results reporting mechanisms;
- Potential role of providing technical assistance.

Private sector

- Collaborate with central agency and ministries to develop periodic feedback mechanisms;
- Provide services –e.g. data collection– as needed.

Media

• Contribute to the dissemination of results of public policies and programs.

Observatories

• Contribute to the collection, analysis, and utilization of data and statistics for informing decision making in government and partner organizations.

International partners

- Promote M&E and results-based management in the region and globally;
- Develop and promote international standards and norms for M&E;
- Contribute to knowledge sharing and to the dissemination of good practices and lessons learned in the development of M&E systems.

Based on: Karkara (2013), EUROsociAL (2015)



Citizens

Citizens

Source: The author



Organizations

Citizens

Central agency (e.g. Ministry of Finance, **Ministry for Planning)**

Other ministries

Implementing agencies

Citizens



Senior government officials (e.g. President's Executive Office, Prime Minister's cabinet)

Parliament

Auditor General or Comptroller's office/commission

High-level M&E committee

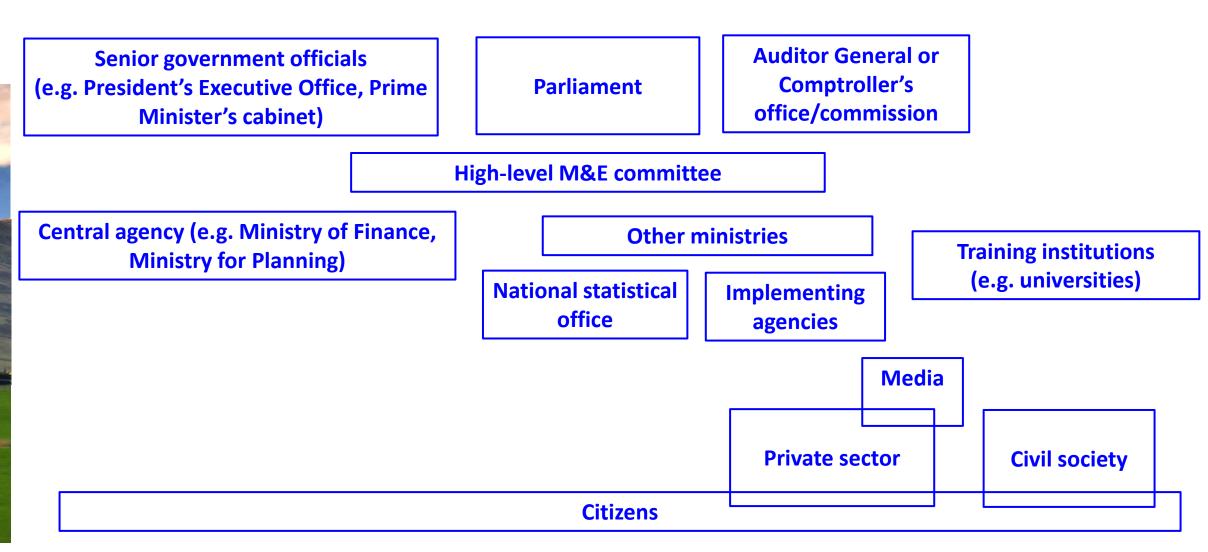
Central agency (e.g. Ministry of Finance, Ministry for Planning)

Other ministries

Implementing agencies

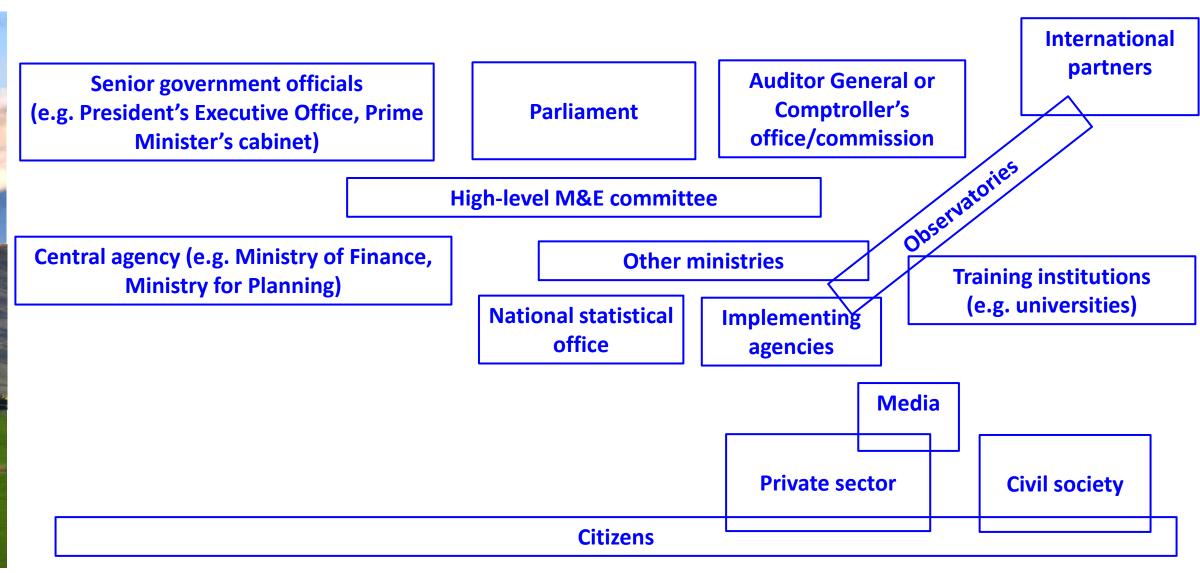
Citizens





Source: The author

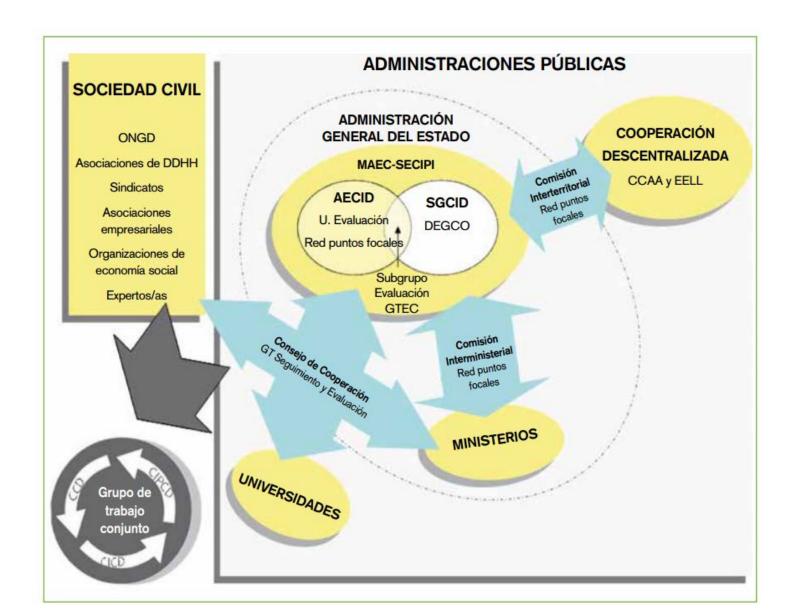




Source: The author



Roles and responsibilities in the institutionalization of M&E – Example: Evaluation system in the Spanish Cooperation



Source: MAEC (2013)



Quick summary (1/2)

- Roles and responsibilities within the M&E system are shaped by:
 - The different (albeit complementary) roles of monitoring and evaluation in resultsbased management;
 - The types of actions that the M&E practice involves: data collection, data analysis, results reporting, discussion, and dissemination; and utilization of recommendations;
 - The specificities of the institutional context to which the M&E system belongs.
- Results monitoring takes place at different result levels (products, effects and impacts):
 - Developing an M&E plan is critical for establishing at each level the individual and collective responsibilities of the implementing agency and partner organizations. The plan needs to:
 - → **Be clear** on the M&E priorities and on who needs what information; and
 - → Be simple –by selecting just a small number of indicators so that they can be well monitored;.



Quick summary (2/2)

- In program evaluation:
 - Establishing steering groups and/or reference groups contributes to enhance the technical quality, good governance and results dissemination of evaluations;
 - It is advisable to consider the pros and cons of internal and external evaluations;
 and, in case of external evaluations, of joining a team of individual evaluators or contracting an evaluation firm.
- Building and institutionalizing a results-based M&E system requires continuous commitment, time, effort, and resources.
 - It is primarily a political process, and less so a technical one;
 - Political leadership ("great champions"), active support by government staff and technical experts ("little champions") and active engagement of other institutions and individual citizens are also needed for ensuring the success of the system.



شكرا لك!

¡Gracias!

Thank you!





Questions / comments?





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