

PMES – 1003 – PLANNING FOR MONITORING & EVALUATION SYSTEMS

1. REASONS FOR CONDUCTING AN EVALUATION, INCLUDING:

- ✚ Providing managers with information regarding program performance. Program plans might change during the implementation process. Evaluations can verify if the program is really running as originally planned. In addition, they provide signs of program strengths and weaknesses, and therefore, enable managers to improve future planning, delivery of services and decision-making.
- ✚ Assisting program managers, staff and other stakeholders to determine in a systematic and objective manner the relevance, effectiveness, and efficiency of activities (expected and unexpected) in light of specified objectives.
- ✚ Mid-term evaluations may serve as a means of validating the results of initial assessments obtained from program monitoring activities.
- ✚ If conducted after the termination of a program/program, an evaluation determines the extent to which the interventions are successful in terms of their impact and sustainability of results.
- ✚ Assisting managers to carry out a thorough review and re-thinking about their programs in terms of their goals and objectives, and means to achieve them.
- ✚ Generating detailed information about program implementation process and results. Such information can be used for public relations, fundraising, promotion of services in the community, as well as identifying possibilities for program replication.
- ✚ Improving the learning process. Evaluations often document and explain the causes as to why activities succeeded or failed. Such documentation can help in making future activities more relevant and effective.

As in monitoring, evaluation activities must be planned at the program/ program level. Baseline data and appropriate indicators of performance and results must be established.

Evaluation goals and objectives should be determined by program management and staff. Many organizations do not have the resources to carry out the ideal evaluation. Therefore, it is preferred that they recruit an external evaluation consultant to lead the evaluation process. This would increase the objectivity of the evaluation. Program strengths and weaknesses might not be interpreted fairly when data and results are analyzed by program staff members that are responsible for ensuring that the program is successful.

In case the organization does not have the technical expertise to carry out the evaluation and cannot afford outside help, or prefers to carry out the evaluation using its own resources, it is recommended to engage an experienced evaluation expert to advise on developing the evaluation plan, selecting evaluation methods, and analyzing and reporting results.

2. RELATIONSHIP BETWEEN MONITORING AND EVALUATION

Monitoring and evaluation are two different management tools that are closely related, interactive and mutually supportive. Through routine tracking of program progress, monitoring can provide quantitative and qualitative data useful for designing and implementing program evaluation exercises. On the other

hand, evaluations support program monitoring. Through the results of periodic evaluations, monitoring tools and strategies can be refined and further developed. Some might argue that good monitoring substitutes program evaluations. This might be true in small-scale or short-term programs, or when the main objective on M&E is to obtain information to improve the process on implementation of an ongoing program. However, when a final judgment regarding program results, impact, there are many reasons for conducting an evaluation, including:

- ❖ Providing managers with information regarding program performance. Program plans might change during the implementation process. Evaluations can verify if the program is really running as originally planned. In addition, they provide signs of program strengths and weaknesses, and therefore, enable managers to improve future planning, delivery of services and decision-making.
- ❖ Assisting program managers, staff and other stakeholders to determine in a systematic and objective manner the relevance, effectiveness, and efficiency of activities (expected and unexpected) in light of specified objectives.
- ❖ Mid-term evaluations may serve as a means of validating the results of initial assessments obtained from program monitoring activities.
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- ❖ Generating detailed information about program implementation process and results. Such information can be used for public relations, fundraising, promotion of services in the community, as well as identifying possibilities for program replication.
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3. THE GLOSSARY OF TERMINOLOGIES:

(A)

Accountability: Responsibility and answerability for the use of resources, decisions and/or the results of the discharge of authority and official duties, including duties delegated to a subordinate unit or individual. In regard to programme managers, the responsibility to provide evidence to stakeholders that a programme is effective and in conformity with planned results, legal and fiscal requirements. In organizations that promote learning, accountability may also be measured by the extent to which managers use monitoring and evaluation findings.

Achievement: A manifested performance determined by some type of assessment.

Activities: Actions taken or work performed through which inputs such as funds, technical assistance and other types of resources are mobilized to produce specific outputs.

Analysis: The process of systematically applying statistical techniques and logic to interpret, compare, categorize, and summarize data collected in order to draw conclusions.

Appraisal: An assessment, prior to commitment of support, of the relevance, value, feasibility, and potential acceptability of a programme in accordance with established criteria.

Applied Research: A type of research conducted on the basis of the assumption that human and societal problems can be solved with knowledge. Insights gained through the study of gender relations for example, can be used to develop effective strategies with which to overcome, socio-cultural barriers to gender equality and equity. Incorporating the findings of applied research into programme design therefore can strengthen interventions to bring about the desired change.

Assumptions: Hypotheses about conditions that are necessary to ensure that: (1) planned activities will produce expected results; (2) the cause effect relationship between the different levels of programme results will occur as expected. Achieving results depends on whether or not the assumptions made prove to be true. Incorrect assumptions at any stage of the results chain can become an obstacle to achieving the expected results.

Attribution: Causal link of one event with another. The extent to which observed effects can be ascribed to a specific intervention.

Auditing: An independent, objective, systematic process that assesses the adequacy of the internal controls of an organization, the effectiveness of its risk management and governance processes, in order to improve its efficiency and overall performance. It verifies compliance with established rules, regulations, policies and procedures and validates the accuracy of financial reports.

Authority: The power to decide, certify or approve.

(B)

Baseline: Facts about the condition or performance of subjects prior to treatment or intervention.

Baseline Study: An analysis describing the situation prior to a development intervention, against which progress can be assessed or comparisons made.

Benchmark: Reference point or standard against which progress or achievements can be assessed. A benchmark refers to the performance that has been achieved in the recent past by other comparable organizations, or what can be reasonably inferred to have been achieved in similar circumstances.

Beneficiaries: Individuals, groups or entities whose situation is supposed to improve (the target group), and others whose situation may improve as a result of the development intervention.

Bias: Refers to statistical bias. Inaccurate representation that produces systematic error in a research finding. Bias may result in overestimating or underestimating certain characteristics of the population. It may result from incomplete information or invalid data collection methods and may be intentional or unintentional.

(C)

Capacity: The knowledge, organization and resources needed to perform a function.

Capacity Development: A process that encompasses the building of technical abilities, behaviours, relationships and values that enable individuals, groups, organizations and societies to enhance their performance and to achieve their development objectives over time. It progresses through several different stages of development so that the types of interventions required to develop capacity at different stages vary. It includes strengthening the processes, systems and rules that shape collective and individual behaviors and performance in all development endeavors' as well as people's ability and willingness to play new developmental roles and to adapt to new demands and situations. Capacity development is also referred to as capacity building or strengthening.

Causality Analysis: A type of analysis used in programme formulation to identify the root causes of development challenges. Development problems often derive from the same root causes (s). The analysis organizes the main data, trends and findings into relationships of cause and effect. It identifies root causes and their linkages as well as the differentiated impact of the selected development challenges. Generally, for reproductive health and population problems, a range of causes can be identified that are interrelated. A "causality framework or causality tree analysis" (sometimes referred to as "problem tree") can be used as a tool to cluster contributing causes and examine the linkages among them and their various determinants.

Chain of Results: The causal sequence in the planning of a development intervention that stipulates the possible pathways for achieving desired results beginning with the activities through which inputs are mobilized to produce specific outputs, and culminating in outcomes, impacts and feedback. The chain of results articulates a particular programme theory.

Conclusion: A reasoned judgment based on a synthesis of empirical findings or factual statements corresponding to a specific circumstance.

Cost-Benefit Analysis: A type of analysis that compares the costs and benefits of programmes. Benefits are translated into monetary terms. In the case of an HIV infection averted, for instance, one would add up all the costs that could be avoided such as medical treatment costs, lost income, funeral costs, etc. The cost-benefit ratio of a programme is then calculated by dividing those total benefits (in monetary terms) by the total programme cost (in monetary terms). If the benefits as expressed in monetary terms are greater than the money spent on the programme, then the programme is considered to be of absolute benefit. Cost-benefit analysis can be used to compare interventions that have different outcomes (family planning and malaria control programmes, for example). Comparisons are also possible across sectors. It is, for instance, possible to compare the cost-benefit ratio of an HIV prevention programme with that of a programme investing in girls' education. However, the valuation of health and social benefits in monetary terms can sometimes be problematic (assigning a value to human life, for example).

Cost-Effectiveness Analysis: A type of analysis that compares effectiveness of different interventions by comparing their costs and outcomes measured in physical units (number of children immunized or the number of deaths averted, for example) rather than in monetary units. Cost-effectiveness is calculated by dividing the total programme cost by the units of outcome achieved by the programme (number of deaths averted or number of HIV infections prevented) and is expressed as cost per death averted or per HIV infection prevented, for example. This type of analysis can only be used for programmes that have the same objectives or outcomes. One might compare, for instance, different strategies to reduce maternal mortality. The programme that costs less per unit of outcome is considered the more cost-effective. Unlike cost-benefit analysis, cost-effectiveness analysis does not measure absolute benefit of a programme. Implicitly, the assumption is that the outcome of an intervention is worth achieving and that the issue is to determine the most cost-effective way to achieve it.

Coverage: The extent to which a programme reaches its intended target population, institution or geographic area.

(D)

Data: Specific quantitative and qualitative information or facts.

Database: An accumulation of information that has been systematically organized for easy access and analysis. Databases are usually computerized.

(E)

Effectiveness: A measure of the extent to which a programme achieves its planned results (outputs, outcomes and goals).

Effective Practices: Practices that have proven successful in particular circumstances. Knowledge about effective practices is used to demonstrate what works and what does not and to accumulate and apply knowledge about how and why they work in different situations and contexts.

Efficiency: A measure of how economically or optimally inputs (financial, human, technical and material resources) are used to produce outputs.

Evaluability: The extent to which an activity or a programme can be evaluated in a reliable and credible fashion.

Evaluation is a periodic, in-depth analysis of programme performance. It relies on data generated through monitoring activities as well as information obtained from other sources (e.g., studies, research, in-depth interviews, focus group discussions, surveys etc.). Evaluations are often (but not always) conducted with the assistance of external evaluators. Program evaluations are less frequent than monitoring activities, considering their costs and time needed

Evaluation: A time-bound exercise that attempts to assess systematically and objectively the relevance, performance and success, or the lack thereof, of ongoing and completed programmes. Evaluation is undertaken selectively to answer specific questions to guide decision-makers and/or programme managers, and to provide information on whether underlying theories and assumptions used in programme development were valid, what worked and what did not work and why. Evaluation commonly aims to determine the relevance, validity of design, efficiency, effectiveness, impact and sustainability of a programme.

Evaluative Activities: Activities such as situational analysis, baseline surveys, applied research and diagnostic studies. Evaluative activities are quite distinct from evaluation; nevertheless, the findings of such activities can be used to improve, modify or adapt programme design and implementation.

Evaluation Questions: A set of questions developed by the evaluator, sponsor, and/or other stakeholders, which define the issues the evaluation will investigate and are stated in such terms that they can be answered in a way useful to stakeholders.

Evaluation Standards: A set of criteria against which the completeness and quality of evaluation work can be assessed. The standards measure the utility, feasibility, propriety and accuracy of the evaluation. Evaluation standards must be established in consultation with stakeholders prior to the evaluation.

Execution: The management of a specific programme which includes accountability for the effective use of resources.

Ex-ante Evaluation: An evaluation that is performed before implementation of a development intervention. Related term: appraisal.

Ex-post Evaluation: A type of summative evaluation of an intervention usually conducted after it has been completed. Its purpose is to understand the factors of success or failure, to assess the outcome, impact and sustainability of results, and to draw conclusions that may inform similar interventions in the future.

External Evaluation: An evaluation conducted by individuals or entities free of control by those responsible for the design and implementation of the development intervention to be evaluated (synonym: independent evaluation).

(F)

Feasibility: The coherence and quality of a programme strategy that makes successful implementation likely.

Feedback: The transmission of findings of monitoring and evaluation activities organized and presented in an appropriate form for dissemination to users in order to improve programme management, decision-making and organizational learning. Feedback is generated through monitoring, evaluation and evaluative activities and may include findings, conclusions, recommendations and lessons learned from experience.

Finding: A factual statement on a programme based on empirical evidence gathered through monitoring and evaluation activities.

Focus Group: A group of usually 7-10 people selected to engage in discussions designed for the purpose of sharing insights and observations, obtaining perceptions or opinions, suggesting ideas, or recommending actions on a topic of concern. A focus group discussion is a method of collecting data for monitoring and evaluation purposes.

Formative Evaluation: A type of process evaluation undertaken during programme implementation to furnish information that will guide programme improvement. A formative evaluation focuses on collecting data on programme operations so that needed

changes or modifications can be made to the programme in its early stages. Formative evaluations are used to provide feedback to programme managers and other personnel about the programme that are working and those that need to be changed.

(G)

Goal: The higher order objective to which a development intervention is intended to contribute.

(I)

Impact: Positive and negative long term effects on identifiable population groups produced by a development intervention, directly or indirectly, intended or unintended. These effects can be economic, socio-cultural, institutional, environmental, technological or of other types.

Impact Evaluation: A type of outcome evaluation that focuses on the broad, longer-term impact or results of a programme. For example, an impact evaluation could show that a decrease in a community's overall maternal mortality rate was the direct result of a programme designed to improve referral services and provide high quality pre- and post-natal care and deliveries assisted by skilled health care professionals.

Indicator: A quantitative or qualitative measure of programme performance that is used to demonstrate change and which details the extent to which programme results are being or have been achieved. In order for indicators to be useful for monitoring and evaluating programme results, it is important to identify indicators that are direct, objective, practical and adequate and to regularly update them.

Inputs: The financial, human, material, technological and information resource provided by stakeholders (i.e. donors, programme implementers and beneficiaries) that are used to implement a development intervention.

Inspection: A special, on-the-spot investigation of an activity that seeks to resolve particular problems.

Internal Evaluation: Evaluation of a development intervention conducted by a unit and /or individual/s reporting to the donor, partner, or implementing organization for the intervention.

(J)

Joint Evaluation: An evaluation conducted with other UN partners, bilateral donors or international development banks

(L)

Lessons Learned: Learning from experience that is applicable to a generic situation rather than to a specific circumstance. The identification of lessons learned relies on three key factors: i) the accumulation of past experiences and insights; ii) good data collection instruments; and iii) a context analysis.

Logical Framework Approach: A specific strategic planning methodology that is used to prepare a programme or development intervention. The methodology entails a participatory process to clarify outcomes, outputs, activities and inputs, their causal relationships, the indicators with which to gauge/measure progress towards results, and the assumptions and risks that may influence success and failure of the intervention. It offers a structured logical approach to setting priorities and building consensus around intended results and activities of a programme together with stakeholders.

Logical Framework (log frame): A dynamic planning and management tool that summarizes the results of the logical framework approach process and communicates the key features of a programme design in a single matrix. It can provide the basis for monitoring progress achieved and evaluating programme results. The matrix should be revisited and refined regularly as new information becomes available.

(M)

Management Information System: A system, usually consisting of people, procedures, processes and a data bank (often computerized) that routinely gathers quantitative and qualitative information on pre-determined indicators to measure programme progress and impact. It also informs decision-making for effective programme implementation.

Means of Verification (MOV): The specific sources from which the status of each of the results indicators in the Results and Resources Framework can be ascertained.

Meta-evaluation: A type of evaluation that aggregates findings from a series of evaluations. Also an evaluation of an evaluation to judge its quality and/or assess the performance of the evaluators.

Methodology: A description of how something will be done. A set of analytical methods, procedures and techniques used to collect and analyze information appropriate for evaluation of the particular programme, component or activity.

Monitoring: A continuous management function that aims primarily at providing programme managers and key stakeholders with regular feedback and early indications of progress or lack thereof in the achievement of intended results. Monitoring tracks the actual performance against what was planned or expected according to pre-determined standards. It generally involves collecting and analyzing data on programme processes and results and recommending corrective measures.

Monitoring continuously tracks performance against what was planned by collecting and analyzing data on the indicators established for monitoring and evaluation purposes. It provides continuous information on whether progress is being made toward achieving results (outputs, outcomes, and goals) through record keeping and regular reporting systems. Monitoring looks at both programme processes¹ and changes in conditions of target groups and institutions brought about by programme activities. It also identifies strengths and weaknesses in a programme. The performance information generated from monitoring enhances learning from experience and improves decision-making. Management and programme implementers typically conduct monitoring.

Multi-Year Planning, Management and Funding Framework (MYFF): A four-year framework that is composed of three interlinking components: (1) a results framework, which identifies the major results that UNFPA aims to achieve, its key programme strategies, and the indicators that will be used to measure progress; (2) an integrated resources framework that indicates the level of resources required to achieve the stated results; and (3) a managing for results component that defines the priorities for improving the Fund's organizational effectiveness.

(0)

Objective: A generic term usually used to express an outcome or goal representing the desired result that a programme seeks to achieve.

Objectively Verifiable Indicator (OVI) (in Results and Resources Framework): See Indicator.

Operations Research: The application of disciplined investigation to problem-solving. Operations research analyses a problem, identifies and then tests solutions.

Outcome: The intended or achieved short and medium-term effects of an intervention's outputs, usually requiring the collective effort of partners. Outcomes represent changes in development conditions which occur between the completion of outputs and the achievement of impact.

Outcome Evaluation: An in-depth examination of a related set of programmes, components and strategies intended to achieve a specific outcome. An outcome evaluation gauges the extent of success in achieving the outcome; assesses the underlying reasons for achievement or non achievement; validates the contributions of a specific organization to the outcome; and identifies key lessons learned and recommendations to improve performance.

Outputs: The products and services which result from the completion of activities within a development intervention. Transformation of inputs into outputs through activities

(P)

Participatory Approach: A broad term for the involvement of primary and other stakeholders in an undertaking (e.g. programme planning, design, implementation, monitoring and evaluation).

Performance: The degree to which a development intervention or a development partner operates according to specific criteria/standards/guidelines or achieves results in accordance with stated plans.

Performance Measurement: A system for assessing the performance of development interventions, partnerships or policy reforms relative to what was planned in terms of the achievement of outputs and outcomes. Performance measurement relies upon the collection, analysis, interpretation and reporting of data for performance indicators.

Performance Indicator: A quantitative or qualitative variable that allows the verification of changes produced by a development intervention relative to what was planned.

Performance Monitoring: A continuous process of collecting and analysing data for performance indicators, to compare how well development interventions, partnerships or policy reforms are being implemented against expected results.

Process Evaluation: A type of evaluation that examines the extent to which a programme is operating as intended by assessing ongoing programme operations. A process evaluation helps programme managers identify what changes are needed in design, strategies and operations to improve performance.

Programme: A time-bound intervention similar to a project but which cuts across sectors, themes or geographic areas, uses a multi-disciplinary approach, involves multiple institutions, and may be supported by several different funding sources.

Programme Approach: A process which allows governments, donors and other stakeholders to articulate priorities for development assistance through a coherent framework within which components are interlinked and aimed towards achieving the same goals. It permits all donors, under government leadership, to effectively contribute to the realization of national development objectives.

Programme Theory: An approach for planning and evaluating development interventions. It entails systematic and cumulative study of the links between activities, outputs, outcomes, impact and contexts of interventions. It specifies upfront how activities will lead to outputs, outcomes and longer-term impact and identifies the contextual conditions that may affect the achievement of results.

Project: A time-bound intervention that consists of a set of planned, interrelated activities aimed at achieving defined programme outputs.

Proxy Measure or Indicator: A variable used to stand in for one that is difficult to measure directly.

(Q)

Qualitative Evaluation: A type of evaluation that is primarily descriptive and interpretative, and may or may not lend itself to quantification.

Quantitative Evaluation: A type of evaluation involving the use of numerical measurement and data analysis based on statistical methods.

(R)

Reach: the coverage (e.g., the range or number of individuals, groups, institutions, geographic areas; etc.) that will be affected by a programme.

Recommendation: Proposal for action to be taken in a specific circumstance, including the parties responsible for that action.

Relevance: The degree to which the outputs, outcomes or goals of a programme remain valid and pertinent as originally planned or as subsequently modified owing to changing circumstances within the immediate context and external environment of that programme.

Reliability: Consistency and dependability of data collected through repeated use of a scientific instrument or data collection procedure under the same conditions. Absolute reliability of evaluation data is hard to obtain. However, checklists and training of evaluators can improve both data reliability and validity.

Research: The general field of disciplined investigation.

Result: The output, outcome or impact (intended or unintended, positive and /or negative) derived from a cause and effect relationship set in motion by a development intervention.

Results Based Management (RBM): A management strategy by which an organization ensures that its processes, products and services contribute to the achievement of desired results (outputs, outcomes & impacts). RBM rests on stakeholder participation and on clearly defined accountability for results. It also requires monitoring of progress towards results and reporting on performance/feedback which is carefully reviewed and used to further improve the design or implementation of the programme.

Results Framework: The logic that explains how results are to be achieved, including causal relationships and underlying assumptions. The results framework is the application of the logical framework approach at a strategic level, across an entire organization, for a country programme, a programme component within a country programme, or even a project.

Risks: Factors that may adversely affect delivery of inputs, completion of activities and achievement of results. Many risk factors are outside the control of the parties responsible for managing and implementing a programme.

Risk Analysis: An analysis or assessment of factors that affect or are likely to affect the achievement of results. Risk analysis provides information that can be used to mitigate the impact of identified risks.

Some external factors may be beyond the control of programme managers and implementers, but other factors can be addressed with some slight adjustments in the programme strategy. It is recommended that stakeholders take part in the risk analysis as they offer different perspectives and may have pertinent and useful information about the programme context to mitigate the risks.

(S)

Stakeholders: People, groups or entities that have a role and interest in the aims and implementation of a programme. They include the community whose situation the programme seeks to change; field staff who implement activities; and programme managers who oversee implementation; donors and other decision-makers who influence or decide the course of action related to the programme; and supporters, critics and other persons who influence the programme environment (see target group and beneficiaries).

Strategies: Approaches and modalities to deploy human, material and financial resources and implement activities to achieve results.

Success: A favorable programme result that is assessed in terms of effectiveness, impact, sustainability and contribution to capacity development.

Summative Evaluation: A type of outcome and impact evaluation that assesses the overall effectiveness of a programme.

Survey: Systematic collection of information from a defined population, usually by means of interviews or questionnaires administered to a sample of units in the population (e.g. person, youth, adults etc.). Baseline surveys are carried out at the beginning of the programme to describe the situation prior to a development intervention in order to assess progress; Mid line surveys are conducted at the midpoint of the cycle to provide management and decision makers with the information necessary to assess and, if necessary, adjust, implementation, procedures, strategies and institutional arrangements, for the attainment of results. In addition, the results of midline surveys can also be used to inform and guide the formulation of a new country programme. End line surveys are conducted towards the end of the cycle to provide decision makers and planners with information with which to review the achievements of the programme and generate lessons to guide the formulation and/or implementation of a new programme/projects.

Sustainability: Durability of programme results after the termination of the technical cooperation channeled through the programme. Static sustainability – the continuous flow of the same benefits, set in motion by the completed programme, to the same target groups; dynamic sustainability – the use or adaptation of programme results to a different context or changing environment by the original target groups and/or other groups.

(T)

Target Group: The main stakeholders of a programme that are expected to gain from the results of that programme. Sectors of the population that a programme aims to reach in order to address their needs.

Time-Series Analysis: Quasi-experimental designs that rely on relatively long series of repeated measurements of the outcome/output variable taken before, during and after intervention in order to reach conclusions about the effect of the intervention.

Thematic Evaluation: Evaluation of selected aspects or cross-cutting issues in different types of interventions.

Transparency: Carefully describing and sharing information, rationale, assumptions, and procedures as the basis for value judgments and decisions.

(U)

Utility: The value of something to someone or to an institution. The extent to which evaluations are guided by the information needs of their users.

(V)

Validity: The extent to which methodologies and instruments measure what they are supposed to measure. A data collection method is reliable and valid to the extent that it produces the same results repeatedly. Valid evaluations are ones that take into account all relevant factors, given the whole context of the evaluation, and weigh them appropriately in the process of formulating conclusions and recommendations.

(W)

Work Plans: Quarterly, annual, or multiyear schedules of expected outputs, tasks, timeframes and responsibilities.