

**Creating and developing evaluation  
organizations:  
lessons learned from Africa, Asia,  
America, Australasia and Europe**

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# Overview: 3 questions (and answers)

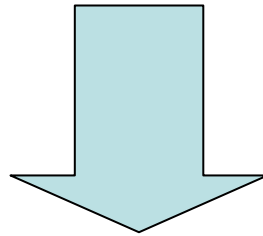
- 1. Why Country-Led Evaluation Capacity Development?**
- 2. Why a book analyzing the lessons learned from 14 Evaluation organizations worldwide?**
- 3. What are the 10 critical issues for establishing an Evaluation Organization?**

# **Why Country-Led Evaluation Capacity Development?**

# Why Country-Led Evaluation Capacity Development?

## The international perspective

**The Paris Declaration on Aid effectiveness is reshaping Development strategies and priorities**



**How to reshape the Evaluation function accordingly?**

# Strengthened development results

**Managing  
for results**

**Mutual  
accounta  
bility**

**Harmoni  
zation**

**Alignment**

**Ownership**

**Paris Declaration on Aid Effectiveness**

# Partner countries exercise effective leadership over their development policies and strategies

## Paris Declaration Commitment

- Partner countries exercise leadership in developing and implementing their national development strategies
- Donors respect partner country leadership and help strengthen their capacity to exercise it.

## Implications to the Evaluation Function

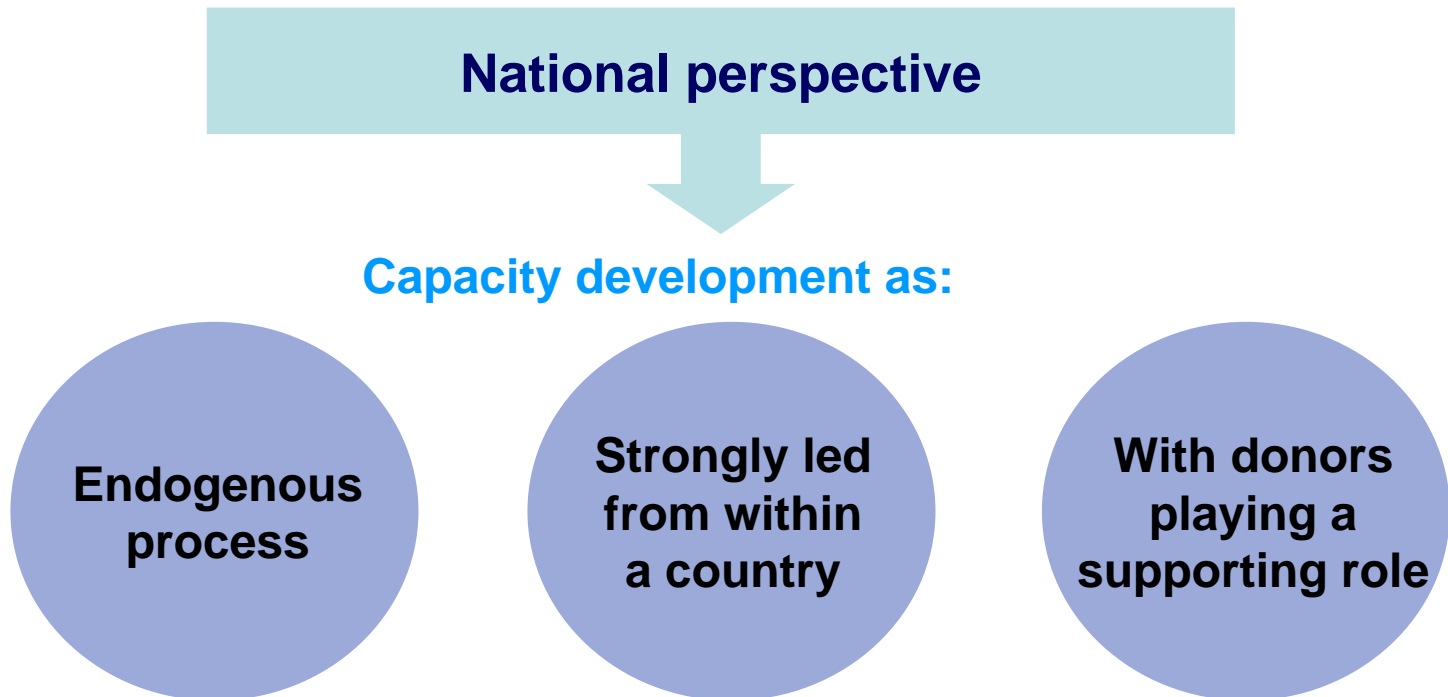


- Country-Led Evaluations and Systems
- Country-Led Evaluation capacity development

# Why Country-Led Evaluation Capacity Development?

## The national perspective

- Capacity development in the past as a technical process (simple transfer of knowledge or organisational models from North to South)
- Not enough thought to the broader political and social context (overemphasis on “right answers”, as opposed to approaches that best fit the country circumstances and the needs of the particular situation)



# **Country-led Evaluation Capacity development**

**Understand  
country  
context**

**(Weak  
evaluation  
culture and  
political  
will)**

**Identify  
and  
support  
sources of  
country-  
owned  
change**

**(Incl. CSO)**

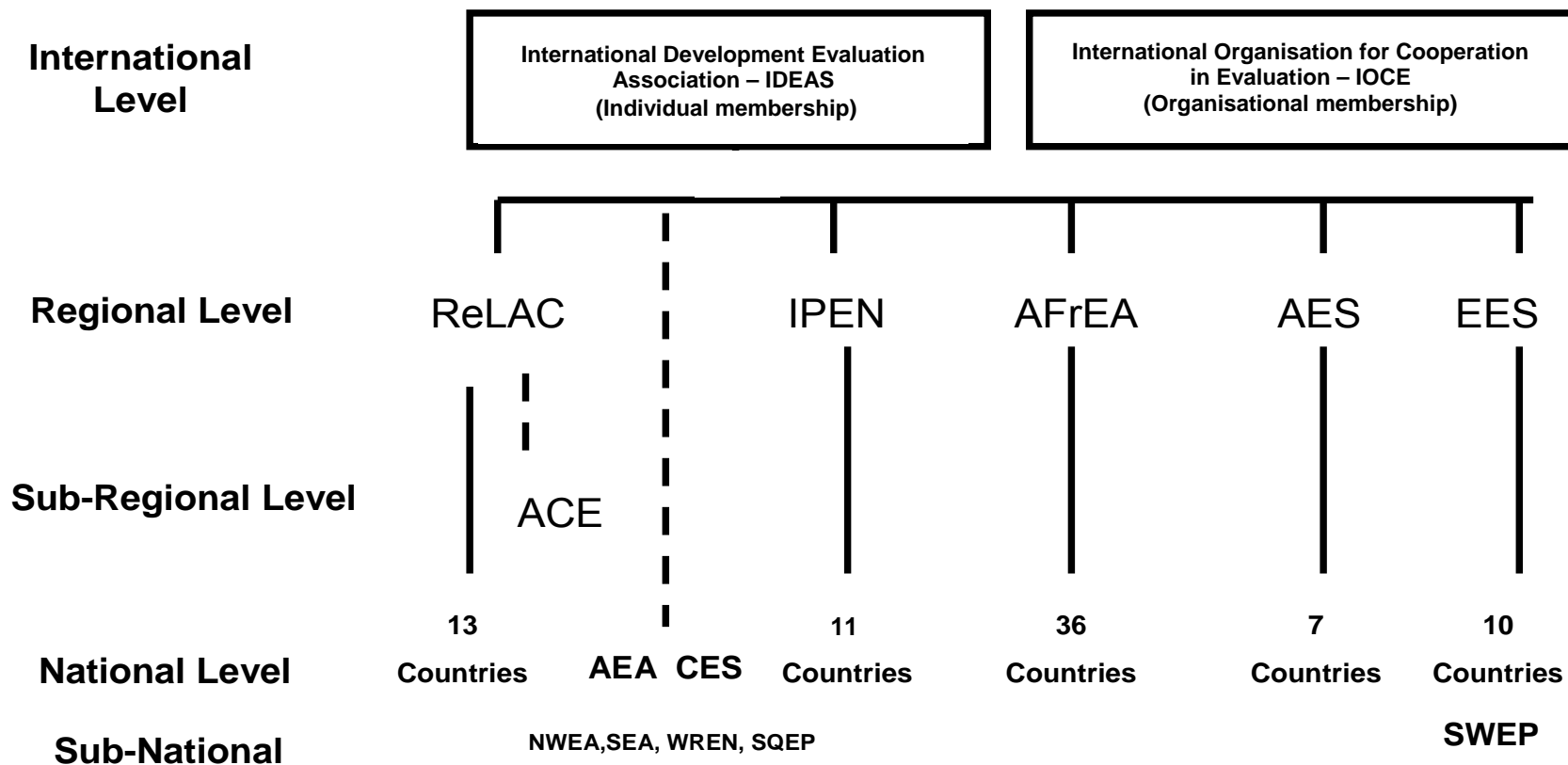
**Deliver  
support  
  
(cost-  
effective,  
local  
suppliers)**

**Learn from  
experience  
and share  
lessons**



**What's the best  
stakeholder to  
ensure Country-  
Led Evaluation  
Development?**

# Locally-led Evaluation Organizations: From few to 50+ in a decade



Adapted from: Quesnel, 2006



International Organisation for Cooperation in Evaluation

## CREATING AND DEVELOPING EVALUATION ORGANIZATIONS

Lessons learned from  
Africa, Asia, Americas, Australasia and Europe

**Why a book analyzing lessons learned from 14 Evaluation organizations worldwide?**

# Why a book analyzing the lessons learned from 14 Evaluation organizations?

- ❖ **Need to learn from different experiences existing in the international Evaluation community and share best practices**
- ❖ **The aim of the IOCE book is to help establish and/or strengthen successful evaluation organizations through the wide dissemination of case studies from all over the world**

# **IOCE Book: 37 authors from different countries and cultures**

- ❖ conceptual framework of Evaluation Capacity Development**
- ❖ analysis of lessons learned and best practices in creating and strengthening 14 evaluation organizations**
- ❖ perspective of international development organizations such as UNICEF and OECD/DAC**

# IOCE Book: a 4 years process

- ❖ **2004:** Decision taken at IOCE Board Meeting in Brazil and agreement on content/approach
- ❖ **2005:** Call for papers, and collection of 14 Case studies
- ❖ **2006:** Analysis of best practices and lessons learned, and production of the book
- ❖ **2007:** Dissemination and use. Presentation at African Evaluation Association Conference in Niger and launch at the Joint IDEAS/ReLAC Conference in Colombia. Made available for free download at the IOCE website

# Overview of the 14 case studies

Organization Name	Year Started	Membership Size	Geographical Reach	Country/ Region Status
African Evaluation Association <b>(AfrEA)</b>	1999	not available	regional	developing
American Evaluation Association <b>(AEA)</b>	1986	3,000	national	Developed
Australasian Evaluation Society <b>(AES)</b>	1986	700	regional	Developed
Brazilian Evaluation Network	2003	approx. 250	national	Developing
Canadian Evaluation Society <b>(CES)</b>	1980	2,000	national	Developed
European Evaluation Society <b>(EES)</b>	1994	400	regional	Developed
International Development Evaluation Association <b>(IDEAS)</b>	2003	approx. 200	global	N/A
International Program Evaluation Network <b>(IPEN)</b>	2000	approx. 360	regional	Developing
Israeli Association for Program Evaluation <b>(IAPE)</b>	1998	120	national	Developed
Italian Evaluation Association <b>(AIV)</b>	1997	250	national	Developed
Kenya Evaluation Association <b>(KEA)</b>	1997	40	national	Developing
Malaysian Evaluation Society <b>(MES)</b>	1999	15	national	Developing
Monitoring and Evaluation Network of Niger <b>(ReNSE)</b>	1999	200	national	Developing
Spanish Evaluation Society <b>(SES)</b>	2001	approx. 96	national	Developed

**What are the 10 critical issues for  
establishing an Evaluation  
Organization?**

# What are the 10 critical issues for establishing an Evaluation Organization\*?

1. Reasons for establishment
2. Natural leaders
3. Ownership of Vision and Mission
4. Effective maintenance and growth
5. Membership
6. Services offered
7. Finances
8. Human resources
9. Strategic Partnership
10. Structure

# 1. Reasons for establishment

- ❖ *To organize and provide structure for an existing but fragmented community of evaluation stakeholders? or*
- ❖ *To raise awareness and demand for evaluation, and build a community of evaluation stakeholders? or*
- ❖ *A Mix of the two above?*

## 2. Natural leaders

- ❖ Most successful associations and networks are fruits of personal and professional commitment by dedicated, passionate and dynamic natural leaders
- ❖ Organization's vulnerability is associated with leaders who are not fully committed to the vision of the organization and do not invest enough time and resources in their leadership role
- ❖ Leadership style has often been found to be responsible for an organization's failure, specifically where the leaders are artificially equipped with absolute power through formal structures and policies

# 3. Ownership of Vision and Mission

- ❖ Well-defined vision and mission shared by existing members and attractive to potential members are decisive prerequisites for success
- ❖ Its development should include different stakeholders with different interests and perspectives, such as: Public Administration, Academia, Civil Society (NGOs), independent consultants and Development agencies

# 4. Effective maintenance and growth

- ❖ A slow and steady pace during the establishment phase is recommended
- ❖ Establishing and maintaining an evaluation association or network requires time and patience
- ❖ Step-by-step success is always better than fast failure

# 5. Membership

- ❖ The most successful organizations are as inclusive as possible and welcome members from all stakeholder groups and subject areas
- ❖ Cross-fertilization of perspectives, approaches and methodologies is essential for the development of evaluation culture, theory and practice

# 6. Services offered

- ❖ Services offered should serve the needs of members
- ❖ On the one hand it is very important to conceptualize services based on sound knowledge of the real needs and professional activities of all evaluation stakeholders
- ❖ On the other hand it is equally important to be realistic in terms of the services that can be offered considering the available infrastructural, financial and human resources of the organization

# 6. Services offered by 14 organizations

## Networking

	AfrEA	AEA	AES	Brazil	CES	EES	IPEN	IAPE	AIV	KEA	MES	ReNSE	SES	Total
annual conference or formal meeting	👍	👍	👍		👍	👍	👍	👍	👍	👎	👍	👍	👍	12
seminars or informal meetings	👍		👍	👍		👍			👍			👍		6
training workshops	👍		👍		👍	👍		👍	👍	👎	👎		👎	9
website	👍	👍	👍	👍	👍	👍	👍	👍	👍		👎	👍	👍	12
resource library	👍	👍	👍	👍			👍					👍		6
newsletter or e-news broadcast		👍	👍		👍	👍	👍	👍			👎	👍		8
e-conference			👍				👍							2
networking communication facility (e.g. e-forums / listserv)	👍	👍		👍			👍	👍			👎	👍		7
thematic or regional groups	👍	👍										👍	👍	4
evaluators database or directory	👍		👍				👍					👍		4
employment opportunity posting or job bank		👍			👍							👍		3
internet hosting (e.g. web space, email server)	👍													1
evaluation consulting services							👍							0
scholarships or travel grants					👍		👍							2
competitions & awards					👍									1
evaluation guidelines or standards or ethical codes	👍	👍	👍		👍	👍							👎	6
qualified editorial activity (e.g. refereed journal)		👍	👍		👍				👍				👎	5
internal M&E system or member needs assessment												👍	👍	2

1. services provided, planned, recommended and not recommended, as reported in the case studies:

👍 service provided    👎 service planned    👍 service recommended    👎 service not recommended

(where a space is left blank, no mention of the related service is made in the case study)

# 6. Services offered by 14 organizations

## Information Sharing

	AfrEA	AEA	AES	Brazil	CES	EES	IPEN	IAPE	AIV	KEA	MES	ReNSE	SES	Total
annual conference or formal meeting	👍	👍	👍		👍	👍	👍	👍	👍	👎	👍	👍	👍	12
seminars or informal meetings	👍		👍	👍		👍			👍			👍		6
training workshops	👍		👍		👍	👍		👍	👍	👎	👎		👎	9
website	👍	👍	👍	👍	👍	👍	👍	👍	👍		👎	👍	👍	12
resource library	👍	👍	👍	👍			👍					👍		6
newsletter or e-news broadcast		👍	👍		👍	👍	👍	👍			👎	👍		8
e-conference			👍				👍							2
networking communication facility (e.g. e-forums / listserv)	👍	👍		👍			👍	👍			👎	👍		7
thematic or regional groups	👍	👍										👍	👍	4
evaluators database or directory	👍		👍				👍					👍		4
employment opportunity posting or job bank		👍			👍							👍		3
internet hosting (e.g. web space, email server)	👍													1
evaluation consulting services							👍							0
scholarships or travel grants					👍		👍							2
competitions & awards					👍									1
evaluation guidelines or standards or ethical codes	👍	👍	👍		👍	👍							👎	6
qualified editorial activity (e.g. refereed journal)		👍	👍		👍				👍				👎	5
internal M&E system or member needs assessment												👍	👍	2

1. services provided, planned, recommended and not recommended, as reported in the case studies:

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# 6. Services offered by 14 organizations

## Training

	AfrEA	AEA	AES	Brazil	CES	EES	IPEN	IAPE	AIV	KEA	MES	ReNSE	SES	Total
annual conference or formal meeting	👍	👍	👍		👍	👍	👍	👍	👍	👎	👍	👍	👍	12
seminars or informal meetings	👍		👍	👍		👍			👍			👍		6
training workshops	👍		👍		👍	👍		👍	👍	👎	👎		👎	9
website	👍	👍	👍	👍	👍	👍	👍	👍	👍		👎	👍	👍	12
resource library	👍	👍	👍	👍			👍					👍		6
newsletter or e-news broadcast		👍	👍		👍	👍	👍	👍			👎	👍		8
e-conference			👍				👍							2
networking communication facility (e.g. e-forums / listserv)	👍	👍		👍			👍	👍			👎	👍		7
thematic or regional groups	👍	👍										👍	👍	4
evaluators database or directory	👍		👍				👍					👍		4
employment opportunity posting or job bank		👍			👍							👍		3
internet hosting (e.g. web space, email server)	👍													1
evaluation consulting services							👍							0
scholarships or travel grants					👍		👍							2
competitions & awards					👍									1
evaluation guidelines or standards or ethical codes	👍	👍	👍		👍	👍							👎	6
qualified editorial activity (e.g. refereed journal)		👍	👍		👍				👍				👎	5
internal M&E system or member needs assessment												👍	👍	2

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# 6. Services offered by 14 organizations

## Standards

	AfrEA	AEA	AES	Brazil	CES	EES	IPEN	IAPE	AIV	KEA	MES	ReNSE	SES	Total
annual conference or formal meeting	👍	👍	👍		👍	👍	👍	👍	👍	👎	👍	👍	👍	12
seminars or informal meetings	👍		👍	👍		👍			👍			👍		6
training workshops	👍		👍		👍	👍		👍	👍	👎	👎		👎	9
website	👍	👍	👍	👍	👍	👍	👍	👍	👍		👎	👍	👍	12
resource library	👍	👍	👍	👍			👍					👍		6
newsletter or e-news broadcast		👍	👍		👍	👍	👍	👍			👎	👍		8
e-conference			👍				👍							2
networking communication facility (e.g. e-forums / listserv)	👍	👍		👍			👍	👍			👎	👍		7
thematic or regional groups	👍	👍										👍	👍	4
evaluators database or directory	👍		👍				👍					👍		4
employment opportunity posting or job bank		👍			👍							👍		3
internet hosting (e.g. web space, email server)	👍													1
evaluation consulting services							👍							0
scholarships or travel grants					👍		👍							2
competitions & awards					👍									1
evaluation guidelines or standards or ethical codes	👍	👍	👍		👍	👍							👎	6
qualified editorial activity (e.g. refereed journal)		👍	👍		👍				👍				👎	5
internal M&E system or member needs assessment												👍	👍	2

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(where a space is left blank, no mention of the related service is made in the case study)

# 6. Services offered by 14 organizations

No organisation offers consulting services, to avoid conflict of interest with its members

	AfrEA	AEA	AES	Brazil	CES	EES	IPEN	IAPE	AIV	KEA	MES	ReNSE	SES	Total
annual conference or formal meeting	👍	👍	👍		👍	👍	👍	👍	👍	👎	👍	👍	👍	12
seminars or informal meetings	👍		👍	👍		👍			👍			👍		6
training workshops	👍		👍		👍	👍		👍	👍	👎	👎		👎	9
website	👍	👍	👍	👍	👍	👍	👍	👍	👍		👎	👍	👍	12
resource library	👍	👍	👍	👍			👍					👍		6
newsletter or e-news broadcast		👍	👍		👍	👍	👍	👍			👎	👍		8
e-conference			👍				👍							2
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thematic or regional groups	👍	👍										👍	👍	4
evaluators database or directory	👍		👍				👍					👍		4
employment opportunity posting or job bank		👍			👍							👍		3
internet hosting (e.g. web space, email server)	👍													1
evaluation consulting services							👎							0
scholarships or travel grants					👍		👍							2
competitions & awards					👍									1
evaluation guidelines or standards or ethical codes	👍	👍	👍		👍	👍							👎	6
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internal M&E system or member needs assessment												👍	👍	2

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# 7. Finances

- ❖ Evaluation organizations should be managed in a manner that requires a minimum of financial resources. Some organizations mention the “zero-budget” approach
- ❖ The more established organizations depend mainly on income generated through profitable annual conferences. When well planned and managed, a single event can generate enough funds to sustain an organization throughout the year
- ❖ Developing organizations find the issue of fundraising to be a real challenge. Many rely heavily on membership fees and/or financial support from Partner Institutions

# 7. Finances

- ❖ There are two opposing points of view among developing organizations on the issue of external funding. Some attribute much of their success to the financial support of external partners, while others warn quite vehemently against accepting any donor funding
- ❖ However, a significant number of organizations found their experiences with Institutional partners to be predominantly positive and report that the financial and in-kind support received played a pivotal role in their success

# 7. Finances

The main recommendations in terms of financial issues are that organizations should:

- ❖ Try to operate with the zero-budget approach wherever possible;
- ❖ make the most of enthusiastic volunteers;
- ❖ exploit strategic partnerships but guard against external prescriptions which may not be compatible with the vision or mission of the organization;
- ❖ avoid financing the core administrative functions of the organization primarily through annual membership fees;
- ❖ solicit funding for specific services and activities from those who will benefit directly from these services, both inside and outside the organization.

# 8. Human resources

- ❖ All of the organizations agree that “people are everything”. Nevertheless, the vast majority agree on the key challenge in terms of human resources: the inherently fragile and unreliable nature of volunteers. Two main solutions:
- ❖ Encourage and reward a culture of volunteerism wherever possible. Some organizations nurture excellence in volunteerism by giving official recognition to exceptional volunteer work (e.g. awards given at annual events).
- ❖ Guard against overloading willing volunteers, a situation which may result in ‘volunteer burn-out’. A suggested solution is to supplement the work done by volunteers with paid support personnel. This may be support through strategic partners, whereby a Partner institutions act as the part-time secretariat for the evaluation organization.

# 9. Strategic Partnership

- ❖ Many organizations stress the importance of building solid partnerships with significant local and international institutions in order to develop a prominent, stable profile.
- ❖ Nevertheless, the potential influence that an evaluation organization can have on national policy can be affected by the level of internal representation from government and other influential institutions
- ❖ Organizations should be clear about their intentions, expectations and the roles they can play before entering into partnerships. Even though the rewards of strong linkages are numerous, some organizations caution against changing the initial mission and objectives of the organization in order to attract partners

# 10. Structure

- ❖ **The majority of the case study organizations were initiated as informal networks and only embarked in the discussion on formalization once this became necessary**
- ❖ **Any decision to formalize requires adequate consideration of all the pros and cons and their relevance to the existing situation and needs of the organization. Organizations that rush into premature formalization often become caught up in bureaucratic systems and procedures, neglecting the essential networking functions and services of an evaluation association**

# An historical opportunity ...

**International  
commitment to  
national leadership  
and ownership**

**National awareness  
of Country-Led  
Evaluation  
Capacity  
Development**

**50+ local  
Evaluation  
organizations all  
over the world**

Let's join forces and  
take advantage of it!

