

A Review of the History and the Current Practice of Aid Evaluation

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Background and Purpose of This Study

The effectiveness of aid has long been questioned. In order to provide an answer for this question, an international taskforce, consisting of the representatives of the World Bank, IMF, donor countries and recipient countries, was formed and a review study was conducted.¹ The findings were published in a book entitled *Does Aid Work?* (Cassen, 1986). The answer to the question produced by the book was: “by and large, yes.” However, the book suggested numerous issues that should be addressed. Then, in the 1990’s, further discussion was stimulated by a World Bank report, known as the “Wapenhans report” (World Bank, 1992), which questioned the success of many of the Bank’s projects. Another World Bank study, *Assessing Aid: What Works, What Doesn’t, and Why* (1998) reflected the severe experience of the Asian Economic Crisis, while questioning the effectiveness of aid provided in poor policy environments. Even today, the same question is still being asked.

Why do we still struggle with the same question? One reason is that this question is very difficult to answer briefly. The situation of aid is more complex than people imagine. Another reason might be that something does not work appropriately in the evaluation system employed by aid agencies. While each single evaluation report concludes significant success of the target project, the entire situation of the developing countries has not changed much for last several decades. People in many developing countries are still under severe poverty although most aid agencies produced numerous evaluations indicating remarkable success. It might be time to examine the evaluation system of aid agencies to look for the reasons for this contradict or situation. Clements (2005a) examined this issue and pointed to an upward bias that forms the “iron triangle” among evaluators, aid agencies, and recipient governments. Correcting this situation would require more sophisticated cost-effectiveness analysis and also assuring an independent position for evaluators. Clements (2005b) also proposed a quality assurance system for aid evaluation of UN agencies.

Following these studies, the study discussed here examined the aid evaluation systems. More than fifty aid agencies were reviewed, under the headings of their major characteristics, criteria, types, volumes, and histories of aid evaluation. Based on preliminary results from this analysis, a meta-evaluation was done to identify best practices (if any) and to propose further study topics.

One caution should be stated. This research described herein is mainly a fact finding study. More in-depth studies are necessary to propose more concrete conclusions and recommendations for improving the current aid evaluation practices.

Review of the Recent Volume of Foreign Aid

Foreign aid, also known as Official Development Assistance (ODA), is delivered from four major sources: (i) bilateral aid, (ii) multilateral aid, i.e., loan agencies, such as the World Bank, (iii) multilateral aid, i.e., the U.N agencies, and (iv) multilateral aid, i.e., the EU. In addition, international NGOs and foundations, such as the Ford Foundations, also provide aid for foreign countries and communities. However, they are generally not regarded as *Official Development Assistance*.

The Development Assistance Committee (DAC), one of the major committees of the Organization for Economic Co-operation and Development (OECD), collects and publicizes the official statistics of financial contribution by bilateral governments every year. Details of the DAC statistics are presented in the Table 1.

According to the 2004 DAC statistics, the total amount of category (i), bilateral aid, amounted to US\$ 57,724.6 millions. Figure 1 displays the name and amount of each donor country (only DAC member countries). Corresponding to the same statistics, the financial contribution (grant and capital subscription) by bilateral governments under category (ii), multilateral loan agencies, amounts to US\$ 8,677 millions (\$6,360 for the World Bank and \$2,318 for the regional banks. No information about IMF). In addition to these capital provisions by bilateral governments, multilateral agencies procure capital from the private capital market by issuing bonds with market interest rates. The total volume of lending by those multilateral loan agencies for developing countries, using procured grants and capitals, is estimated as US\$ 50,123 millions (\$17,045 for The World Bank group; \$6,137 for IMF; 6,100 for Inter-American Development Bank; \$5,662 for European Bank for Reconstruction and Development; \$5,630 for International Finance Corporation; \$5,293 for Asian Development Bank, and \$4,310 for African Development Bank). This figure was calculated from annual financial reports of the respective agencies. However, this figure is simply a gross amount and

repayments made are not included. It is expected that the ratio of repayment is more or less one fourth or one fifth of the gross amount.

According to the same statistics, the total amount of the financial contribution (grant and capital subscription) by bilateral governments to category (iii), the U.N agencies, was reported as US\$ 5,276.3 millions. However, if the annual budgets of major U.N agencies are summed up, the total amount goes to US\$ 9,963 millions. The agencies for this summation include the U.N headquarters, all ten U.N. special programs, and six major U.N. specialized agencies (see Figure 2)².

Finally, the EU, category (iv), provides foreign aid to outside territories financed by its member countries.³ The total amount reported by DAC statistics is US\$ 8,704 millions. Table 2 summarizes the four categories of aid. I do not make a summation of them, because the nature of the figures is significantly different.

Table 1.
DAC statistics: Financial contribution for aid activates by bilateral governments (2004)

A star (*) indicates the agency which aid system is reviewed in this study (2004, US\$ millions)

	Total ODA	(1) Bilateral ODA							(2) Grants & Capital Subscription for Multinational agencies						Ratio of Bilateral ODA in the total ODA
		(a) Grants	Project & Program Aid	Technical Cooperation	Other type of Grants	(b) Loans by Government	(c) Others		To U.N. Agencies	To WB groups (IBRD, IDA, IFC, MIGA)	To Regional Development Banks (ADB, AfDB, IDB, EBRD)	To EC	Others		
* United States	19,704.91	16,249.50	17,026.60	4,558.43	7,346.65	5,121.52	(251.54)	(525.56)	3,455.41	440.40	1,753.41	490.17	-	771.43	82.5%
* Japan	8,922.46	5,917.19	7,130.63	1,027.93	1,914.14	4,188.56	1,041.28	(2,254.72)	3,005.27	1,242.81	1,034.92	449.96	-	277.58	66.3%
* France	8,472.56	5,566.84	6,066.77	634.28	2,340.19	3,092.30	(240.23)	(259.70)	2,905.73	180.24	396.63	163.64	1,863.35	301.86	65.7%
* United Kingdom	7,882.69	5,338.72	5,239.06	1,450.87	751.09	3,037.10	63.62	36.04	2,543.97	380.65	328.45	130.35	1,529.23	175.28	67.7%
* Germany	7,534.21	3,822.59	4,512.97	639.30	2,486.08	1,387.59	(393.15)	(297.23)	3,711.62	288.93	1,147.82	170.03	1,880.86	240.76	50.7%
* Netherlands	4,203.82	2,670.21	3,217.19	744.27	663.34	1,809.58	(531.60)	(15.39)	1,533.62	446.21	544.82	72.87	382.84	86.87	63.5%
* Sweden	2,722.01	2,075.76	2,066.05	1,210.48	112.10	743.47	9.71	-	646.26	290.11	24.50	47.69	225.15	58.80	76.3%
* Canada	2,599.13	1,990.98	2,021.68	959.01	414.35	648.32	(30.70)	-	608.15	156.04	208.81	102.06	-	141.24	76.6%
* Norway	2,198.66	1,536.44	1,495.50	781.23	287.43	426.84	(5.60)	46.54	662.22	428.77	120.49	74.25	-	38.71	69.9%
* Spain	2,436.99	1,400.27	1,227.15	121.09	340.22	765.84	240.35	(67.23)	1,036.72	47.99	190.16	131.07	627.54	39.95	57.5%
* Denmark	2,037.13	1,202.05	1,191.53	830.62	112.27	248.64	4.32	6.20	835.08	337.16	99.66	50.16	178.57	169.53	59.0%
* Australia	1,460.13	1,190.61	1,190.61	83.69	691.67	415.25	-	-	269.52	44.32	87.29	73.82	-	64.10	81.5%
* Switzerland	1,545.44	1,186.88	1,172.64	545.30	117.07	510.27	(6.05)	20.29	358.56	116.82	146.37	42.29	-	53.08	76.8%
* Belgium	1,463.31	902.42	952.76	112.15	414.33	426.28	(45.43)	(4.91)	560.89	51.89	93.73	25.60	334.76	54.90	61.7%
* Portugal	1,031.05	872.71	178.97	14.89	114.49	49.59	693.74	-	158.34	9.98	12.41	17.39	112.45	6.11	84.6%
* Italy	2,461.54	704.16	854.86	287.26	140.35	427.25	(150.70)	-	1,757.38	252.83	16.67	169.43	1,186.01	132.44	28.6%
* Ireland	607.44	409.59	409.59	171.10	11.91	226.58	-	-	197.85	61.33	26.87	-	92.53	17.12	67.4%
* Finland	679.92	401.77	396.76	-	178.15	218.61	-	13.74	278.10	87.11	-	15.74	128.77	-	59.1%
* Austria	677.63	352.53	380.25	10.69	132.93	236.63	(3.60)	(24.12)	325.10	26.19	46.46	30.14	199.85	22.45	52.0%
* Greece	464.59	303.81	303.81	26.80	195.85	81.16	-	-	160.78	8.01	4.43	-	143.65	4.68	65.4%
* Luxembourg	235.59	171.12	171.12	105.80	4.33	60.99	-	-	64.47	11.77	10.94	10.64	20.34	10.78	72.6%
* New Zealand	212.10	159.03	159.03	55.89	45.73	57.41	-	-	53.07	15.30	8.26	6.56	-	22.95	75.0%
(1) Sub-total: DAC Bilateral Donors	79,553.31	54,425.18	57,365.53	14,371.08	18,814.67	24,179.78	394.42	(3,326.05)	25,128.11	4,924.86	6,303.10	2,273.86	8,905.90	2,673.84	68.4%
Arab Countries	2,124.14	2,057.23	-	-	-	-	-	-	66.91	-	-	-	-	-	96.9%
Other Bilateral Donors	491.97	467.64	-	-	-	-	-	-	23.97	-	-	-	-	-	95.1%
Korea	423.32	330.76	212.09	123.78	53.83	34.48	118.68	-	92.56	21.58	44.18	28.29	-	18.55	78.1%
Turkey	339.15	291.84	291.84	-	184.71	107.13	-	-	47.31	16.21	10.05	15.36	-	5.69	86.1%
Czech Republic	108.17	63.48	63.48	28.37	10.95	24.16	-	-	44.69	5.52	2.48	-	33.57	3.11	58.7%
Hungary	70.14	35.49	-	-	-	-	-	-	34.64	-	-	-	-	-	50.6%
Poland	117.51	24.89	24.89	-	-	24.89	-	-	92.62	7.88	-	-	76.52	-	21.2%
Iceland	21.24	16.36	-	-	-	-	-	-	4.87	-	-	-	-	-	77.0%
Slovak Republic	28.23	10.75	-	-	-	-	-	-	17.47	-	-	-	-	-	38.1%
Lithuania	9.08	0.81	-	-	-	-	-	-	8.27	-	-	-	-	-	8.9%
Latvia	8.33	0.21	-	-	-	-	-	-	8.12	-	-	-	-	-	2.5%
(2) Subtotal: Non-DAC Bilateral Donors	3,741.28	3,299.46	592.30	152.15	249.49	190.66	118.68	-	441.43	51.19	56.71	43.65	110.09	7.31	88.2%
Grand Total: All Bilateral Donors	83,294.59	57,724.64	57,957.83	14,523.23	19,064.16	24,370.44	513.10	(3,326.05)	25,569.54	4,976.05	6,359.81	2,317.51	9,015.99	2,681.15	1.57
(3) EC	8,703.57	8,067.95	7,793.89	5,401.52	479.03	1,913.34	274.06	-	635.62	300.27	282.15	-	-	53.20	92.7%
Grand Total, including EC**	91,998.16	65,792.59	65,751.72	19,924.75	19,543.19	26,283.78	787.16	(3,326.05)	26,205.16	5,276.32	6,641.96	2,317.51	9,015.99	2,734.35	71.5%

** The OECD-DAC official figure of total ODA is US\$ 91,998.16 million. But it is clear that this figure counts EC contribution twice.
Source) OECD S database (http://www1.oecd.org/scripts/cde/viewbase.asp?dbname=cde_dac)

Table 2.

Summary of aid by four categories

Categories of aid	Amount (US\$ mill.)
(i) Bilateral Aid*	57,724.6
(ii) Multilateral aid	50,123.0
- the Loan agencies**	
(iii) Multilateral aid	9,963.0
- the U.N agencies***	
(iv) Multilateral aid	8,703.6
- EU****	

* Total amount of government-to-government aid (DAC statistics)

** Total amount of lending (from each agency's annual report)

*** Total annual budget of the head quarter and 19 major programs and agencies (from Japan ODA White Paper 2005)

**** Total amount of aid by EU (DAC statistics)

Sources) DAC statistics, Annual reports of each agencies

Japan ODA White Paper (2005)

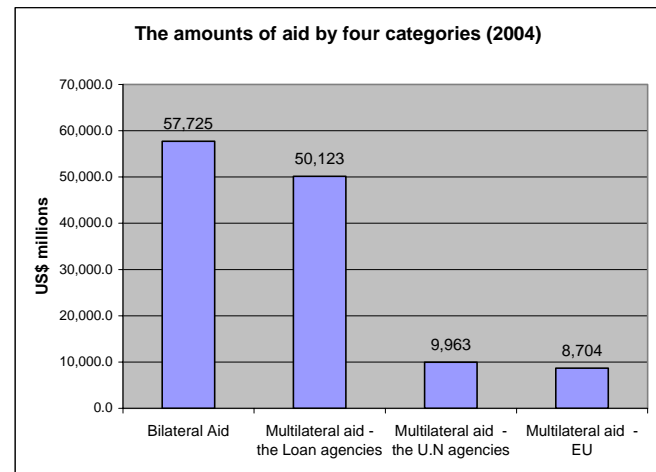
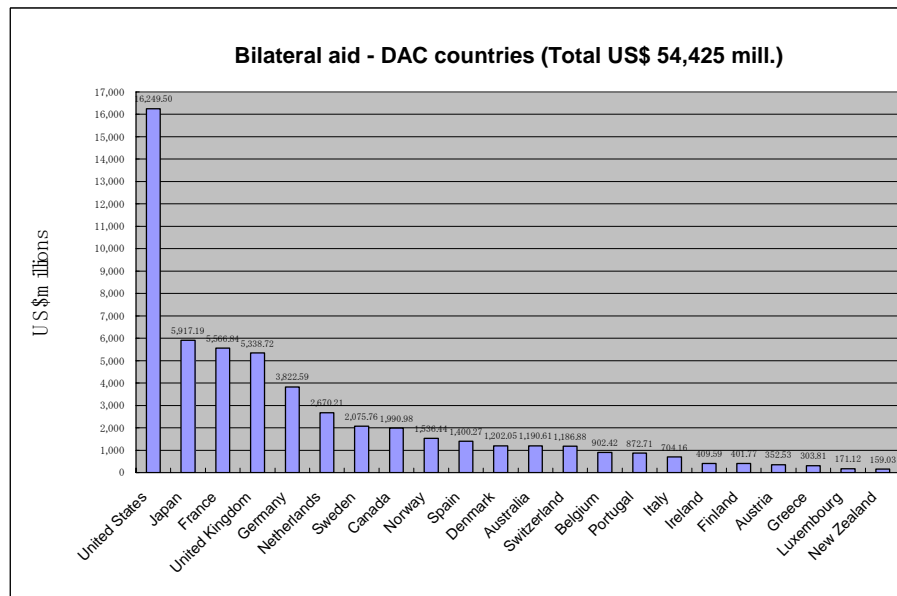


Figure 1.

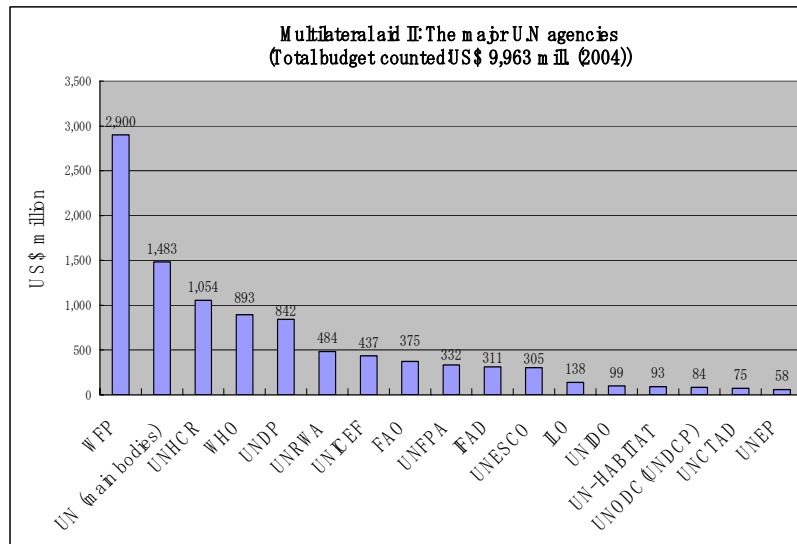
Bilateral aid – DAC countries (Total US\$ 54,425 millions. 2004)



Note. The total amount of bilateral aid is US\$57,724.6 and that of 22 DAC countries is US\$54,425.2 millions (2004).

Figure 3.

Multilateral aid – The major UN agencies (Total budget: US\$ 9,963 millions (2004))



Brief Review of the History of Aid Evaluation

Following the previous section in which the current volume and its contributors were briefly reviewed, we now examine the history of aid evaluation. Since it is naturally expected that the background thinking and practices of aid evaluation are closely tied to or reflected in those of foreign aid at each period, we should review the history of foreign aid. Hjertholm and White (2000) summarized the history from 1940s to 1990s (see Table 3). Their summary is useful when considering why a certain movement of aid evaluation became dominant and then declined (while sometimes coming back).

Although some reviews of the history of aid evaluation at particular aid agencies exist, a comprehensive review of global aid evaluation seems

missing⁴. Clearly, it was very difficult to synthesize these reviews, because they are not compatible and sometimes even contradictory. However, a preliminary synthesis based on the available literature and a review of the results of general trends in foreign aid is provided here.

In the mid-1940s, the World Bank and several U.N agencies were established (1944 and 1945, respectively). The underlying theory for their creation had been anchored by economics, especially by its subdivision, development economics. Economists have provided the main theoretical models for understanding how aid works (Clements, 1996. p.12). In this period, though no report which included the word of “evaluation” in its title was found, the effectiveness of development aid was discussed within the framework of development economics. One good example, the so-called “Lewis report”, with the formal title *Measures for the Economic Development of Under-Developed Countries*, was submitted to the U.N by Nobel Prize economist Lewis, A. (1951). In this period (1940s), the main focus of aid was reconstruction, especially reconstruction of infrastructures, such as transportation and electricity facilities in Europe.

In 1950s, development aid suffered from ideological confrontation, as evident in the competition between the United States and the Soviet Union to provide aid for developing countries. The main focus of aid for developing countries, then called “third world”, was community development. The typical types of aid continue to be used today and were formulated as project-type aid and food aid. In this period, preliminary work focusing evaluation methods was conducted and a report, *Evaluating Development Projects* (Hayes, 1959),

prepared for UNESCO. The report suggested the most basic steps of evaluation applicable to the less developed countries⁵ (Rossi, Lipsey & Freeman, 2004, p.9).

In the 1960s, the establishment of bilateral aid agencies boomed, including developments in France (1961), Germany (1961), Japan (1961), Sweden (1961), Netherlands (1964), Norway (1962), Belgium (1962), Canada (1968), and others. The UK Colonial Development Corporation (CDC), which established in 1948, was reorganized into UK Overseas Development Ministry (ODM) in 1964 and later renamed into ODA (1970), and then into DFID (1997). The U.S Economic Cooperation Agency, originally established in 1951 for the Marshall Plan, was renamed as USAID in 1961. They found their roles in providing technical assistance (T.A) and budget support, whereas multilateral agencies had supported the large-scale project-type aid. However, quite soon, the bilateral donors got into conducting the project-type aid, with a focus on the productive sectors and a continued interest in infrastructure. In this period, economic cost-benefit and cost-efficiency analyses for project appraisal gained some methodological sophistication (Mckean, 1966; Krutilla & Eckstein, 1964; Dorfman, 1963; and Mishan, 1971). At the same time, Baum and Tolbert (1968) wrote an article about project investment analysis in the World Bank, reaching wide audiences (Baum & Tolbert, 1985, p. ix). Hirschman's *Development Project Observed* (1967) was considered as the true preliminary trial of evaluating aid projects (Cracknell, 2000, p. 40). Though it claimed the impacts of the aid projects were generally disappointing, this trial received great attention in the aid evaluation community.

Table 3.

Review of main developments in the history of foreign aid and its evaluation activities

	Dominant or rising institutions	Donor ideology	Donor focus	Types of aid	Trends in aid evaluation	Aid evaluation reports / Influential books
1940s	Marshall Plan and UN system (including World Bank).	Planning.	Reconstruction.	- Marshall Plan (largely program aid)		
1950s	United States, with Soviet Union gaining importance from 1956.	Anti-communist, but with role for the state.	Community Development Movement.	- Food aid - Projects aid		Lewis (1951) Hayes (1959)
1960s	Establishment of bilateral programs	As for the 1950s, with support for state in productive sectors.	Productive sectors (e.g. support to the green revolution) and infrastructure.	- Bilaterals gave TA & budget support - Multilaterals supported projects.	(The boom in establishment of bilateral aid agencies.) - <i>Sophistication of economic analysis for project preparation</i>	Campbell & Stanley (1966) Hirschman (1967)
1970s	Expansion of multilaterals especially World Bank, IMF and Arab-funded agencies).	Continued support for state activities in productive activities and meeting basic needs.	Poverty, taken as agriculture and basic needs (social sectors).	- Fall in food aid - Start of import support.	The boom in establishment of evaluation units. - <i>Focus on the process of aid</i> - <i>Large-scale experiments & disappointment.</i> - <i>Log-frame by USAID</i>	Tendler (1975) Rossi, Freeman & Wright (1978)
1980s	Rise of NGOs from mid-1980s.	Market-based adjustment (rolling back the state).	Macroeconomic reform.	- Financial program aid - Debt relief.	Focus on aid effectiveness by various approaches - <i>Rapid, low-cost methods</i> - <i>Participatory approach</i> - <i>Training & empowerment</i>	Scriven (1980) Casley & Lury (1982) Cassen (1986) OECD (1986) Riddell (1987) Chambers (1988)
1990s-	Eastern Europe & FSU become recipients; emergence of corresponding institutions.	Market-based adjustment continued	Environment and gender (but passed quickly).	Financial program aid & debt relief continue	Diffusion of DAC's evaluation criteria vs. Adoption of "Managing results" approach. - <i>Sector level, country level, and thematic evaluation.</i>	OECD-DAC (1991) "DAC evaluation criteria" Osborne & Gaebler. (1993) World Bank (1992) "Wapenhans report"
(Late '90s – 2000s)	Aid coordination forum at local level as well as headquarter level	Move back to role of the state. (Balance the market & the state)	Poverty and then governance	Move toward sector support.	New agenda: Sector program evaluation New agenda: Evidence-based evaluation in aid	World Bank (1998) Wolfenson. (1998) Hatry (1999)

Note. Entries are main features or main changes, there are of course exceptions.



<http://evaluation.wmich.edu/jmde/>

Articles

Source: The left table is adapted from Hjertholm, P & White, H. (2000).p81 with some modification by the author (Sasaki). The row of “Late ‘90s – 2000s” and the light table are prepared by the author (Sasaki).

In the 1970s, the main focus of aid shifted to agricultural development and basic human needs (social sectors), reflecting an ideological shift in the aid community, from economic development to poverty reduction. In this period, bilateral aid agencies as well as the multilateral agencies set up evaluation units one after another. It looked like “boom in establishment of evaluation units” after the ten years since the boom in establishment of bilateral agencies. Agencies started conducting evaluation on their aid projects, although the primary focus during that period was on short and medium-term aspects of process (design and implementation), (Valadez & Bamberger, 1994). While it may have been enough for infrastructure projects, in addition to measuring the degree of economic development to some extent, their methodologies of evaluation were not appropriate for programs and projects in the social sector. Reflecting the need for more systematic evaluation, Rossi, Freeman, and Wright were invited for the UNESCO’s international conference in 1977 to present the current state-of-the-art in evaluation research. Based on these presentations, *Evaluation: A systematic Approach (1st ed.)* (1978) and *Doing Evaluation* (1980)⁶ were published. Both books were well disseminated in the aid evaluation community. At the same time, evaluation separated from the economic analysis in aid sector.

During this period, another important event related to aid evaluation took place. Some large-scale aid evaluations in Colombia (1971-1975) and Nicaragua (1974-78) employed the experimental design that had been advocated by Campbell and Stanley (1966), (Rawlings, 2003). However, the researchers in the aid community concluded that experimental and rigorous

quasi-experimental designs were unrealistically complex, slow, and expensive, thus should be replaced by more rapid and economical ways (Valadez & Bamberger, 1994).

In the 1980s, the market-based reform had been heavily dominant in developed countries (known as “Reaganomics”, “Thatcherism”, and “Nakasoneism” in Japan); in response to the general distrust of the government institutions. The wave of this reform soon reached governmental aid activities. The World Bank quickly shifted from its project-based aid to the famous structural adjustment program which involves deep reliance on market mechanisms. This wave also stimulated the rise of non-governmental organizations (NGOs) and the movement of participatory/empowerment approaches (Chamber 1988), both of which tried avoiding the use of governmental mechanisms. In the same context, the effectiveness and impact of governmental aid activities had been seriously questioned (Riddell, 1987). While evaluation units of aid agencies tried detecting impacts and effectiveness, their evaluation methods varied from very simple and low-cost means, such as expert review (Kumar, 1987 & 1989), to more systematic or formal ways, such as the experimental design. A landmark study, Cassen’s (1986) *Does Aid Work?* was produced in this period. As the first trial to make judgment of aid effectiveness, Cassen reviewed major aid activities and synthesized aid evaluations that had been conducted so far. While attempting to answer the long held question “*Does aid work?*”, the evaluation result were complex, resulting in a “by and large, yes” conclusion while suggesting numerous concerns, such as inefficiency caused by a lack of coordination

among donor agencies and recipient governments (p.225). Similar concerns were shared by European donors and the EC (now called EU) who developed the Project Cycle Management (PCM) system to cope with them (Eggers, 2002). PCM became widely accepted among European donors as well as Japan in 1990s and 2000s. Recording the methodological developments in aid evaluation in this period, OECD published *Methods and Procedures in Aid Evaluation* (1986).

In the 1990s, Eastern Europe and the former Soviet Union became aid recipients rather than providers. Moreover, the aid community remained committed to market-based development and continued applying its philosophy for their aid. However, the “Wapenhans report” (World bank, 1992) questioned the success of many of the Bank’s operations and suggested the Bank should move toward some new approaches that neither represented traditional project-type aid nor simple market-based program loans. Independent of this event, two dynamic trends were simultaneously pursued among donor agencies: (i) *the diffusion of the DAC five evaluation criteria* and (ii) the “*Managing Results*” approach. In 1991, the OECD-DAC Working Party on Aid Evaluation approved the *DAC five evaluation criteria* (i.e., relevance, effectiveness, efficiency, impact, and sustainability), which are well accepted by many aid agencies, especially European donors, and the many U.N agencies, as well as Japan. In the 1990s, the PCM system took DAC evaluation criteria and became widely used as a management tool among European donors and Japan. On the other hand, one landmark book was published in the U.S: *Reinventing Government: How the Entrepreneurial*

Spirit is Transforming the Public Sector (Osborne & Gaebler, 1993)⁷. It proposed the concept of ‘managing results’ by introducing strategic planning and performance measurement. The U.S federal government chose to follow this idea and requested all federal agencies, including USAID, to formulate its strategy and conduct performance measurement, aka outcome monitoring. Other aid agencies and donor countries, including CIDA, Australia, New Zealand, and the U.S-based international aid agencies, such as UNDP and other U.N agencies, followed this movement. Among aid agencies, the system based on the concept of “managing results” became generally known as Result Based Management (RBM).

In 1997, the Asian Economic Crisis occurred and many developing countries suffered severe effect on their economic development. Again, the effectiveness of aid was questioned and aid agencies were forced to reconsider their basic philosophies and approaches to aid (Wolfenson, 1998). The shared purpose of aid was redirected to poverty reduction. Aid agencies admitted that simple reliance on market mechanism was not the panacea, and a good mixture of transparent markets and efficient governance should be pursued. The basic approach of aid shifted from independent projects, regardless of loan, TA, food provision, or other types of project, to sector-wide programs. Several remarkable papers were published for guiding this new movement (Foster, 2000; Foster & Brown, 2001; Riddell, 2003). While evaluation was no exception to this reconsideration, the methodologies proposed and employed to cope with the new movement were just applications of the DAC five evaluation criteria and performance measurement, or a mixture thereof,

leaving a great need to develop new frameworks and methodologies suitable to appropriately evaluate the progress of sector-wide programs.

In addition, and more recently, additional trends can be observed, including ‘Evidence-based’ evaluation in aid. Advocated by some institutes, such as the Poverty Action Laboratory at MIT, this idea represents a revival of the use of true experimental designs to objectively and rigorously detect aid effectiveness (Duflo & Kramer, 2003).

Overview of Evaluation Practices Among Aid Agencies

A total of 51 aid agencies were reviewed in terms of their evaluation activities (see Table 4), including all DAC member countries (22 countries with a total of 26 aid agencies), member loan agencies (7), all major UN agencies (17), and the EU. Some countries have more than one aid agencies (e.g., Japan and Germany have three agencies). In that case, each agency is reviewed independently. The summary of each review is included as an Appendix to this study.

Table 4.

Estimation of volume of evaluation reports, annual reports and guidelines

	# of agencies reviewed	Volume of Aid (US\$ mill.)	Volume of evaluation (# of evaluation reports available at agency's website)	# of agencies publishing annual evaluation report	# of agencies having eval. guidelines
Bilateral agencies (DAC members)	26	54,425 *	449	9	15
Multi I: The loan agencies	7	50,123 **	200	7	5
Multi II: The UN agencies	17	99,963 ***	317	9	10
Multi III: EU	1	8,704 ****	12	0	0
Total	51		978	25	30

* Total amount of bilateral aid of 22 DAC member countries (from DAC Statistics)

** Total amount of lending (from each agency's annual report)

*** Total annual budget of the head quarter and 19 major programs and agencies (from Japan ODA White Paper 2005)

**** Total amount of aid by EC (from DAC statistics)

Source) DAC statistics, Annual report of each agencies, Japan ODA White Paper (2005)

As indicated in the history section, the current evaluation approaches in the aid community are divided into two major streams. In addition, there is a group which seeks its own evaluation approaches. These three groups are synthesized below and a brief description about others not to be categorized at this time is provided. Figure 3 provides a graphical summary of the grouping.

Group one: DAC evaluation criteria

The members of this group accept the famous DAC five evaluation criteria (relevance, effectiveness, efficiency, impact and sustainability) as their main evaluation criteria. This group is categorized into two sub-groups: (a) those agencies that use the original DAC five evaluation criteria, including JICA, JBIC, BMZ, Netherland, Spain, Norway, Denmark, EBRD, IFC, and UNCTAD and (b) those agencies which significantly modified the DAC criteria, including the Ministry of Foreign Affairs of Japan (MOFA), France, KfW, Sweden, Austria, World Bank, IADB, AsDB, and FAO. How did they modify it? If we take the example of the World Bank, it merges effectiveness and impact into a new concept, *efficacy*. Also the Bank adds three new criteria:

institutional development impact, bank performance, and borrower performance. Therefore, we can see more management-focused evaluation criteria in the Bank's modification. In addition, the Bank uses the summarized, intermediate criteria, i.e., 'outcome'.

Group two: Results-Based Management (RBM) approach

The members of this group accept the concept of monitoring and evaluation based on Results-Based Management (RBM). This concept requires an agency to formulate an organization-wide (or sector- and country-wide) strategic plan, which consists of a mission, vision, strategic objectives, and *indicators and associated target values*. Sometimes it is expressed in the shape of a tree, called an *objective-tree*, a *result framework*, or simply a *strategy*. Then, the degree of achievement of the target values is assessed and the monitoring results are fed back to management decision-making and modification of the strategic plan. In this approach, monitoring (assessing the value of the set of indicators) is important. Evaluation is seen as a special tool for answering questions from the management. This group includes USAID, CIDA, AusAID, WFP, UNDP, and IFAD.

In addition, there are several agencies which utilize both DAC evaluation criteria and RBM approaches. The RBM approach is utilized for organizational management and the DAC criteria for the traditional evaluation conducted by their independent evaluation units. This mixed-approach group includes GTZ, AfDB, UNICEF, and ILO.

Group three: The new approach

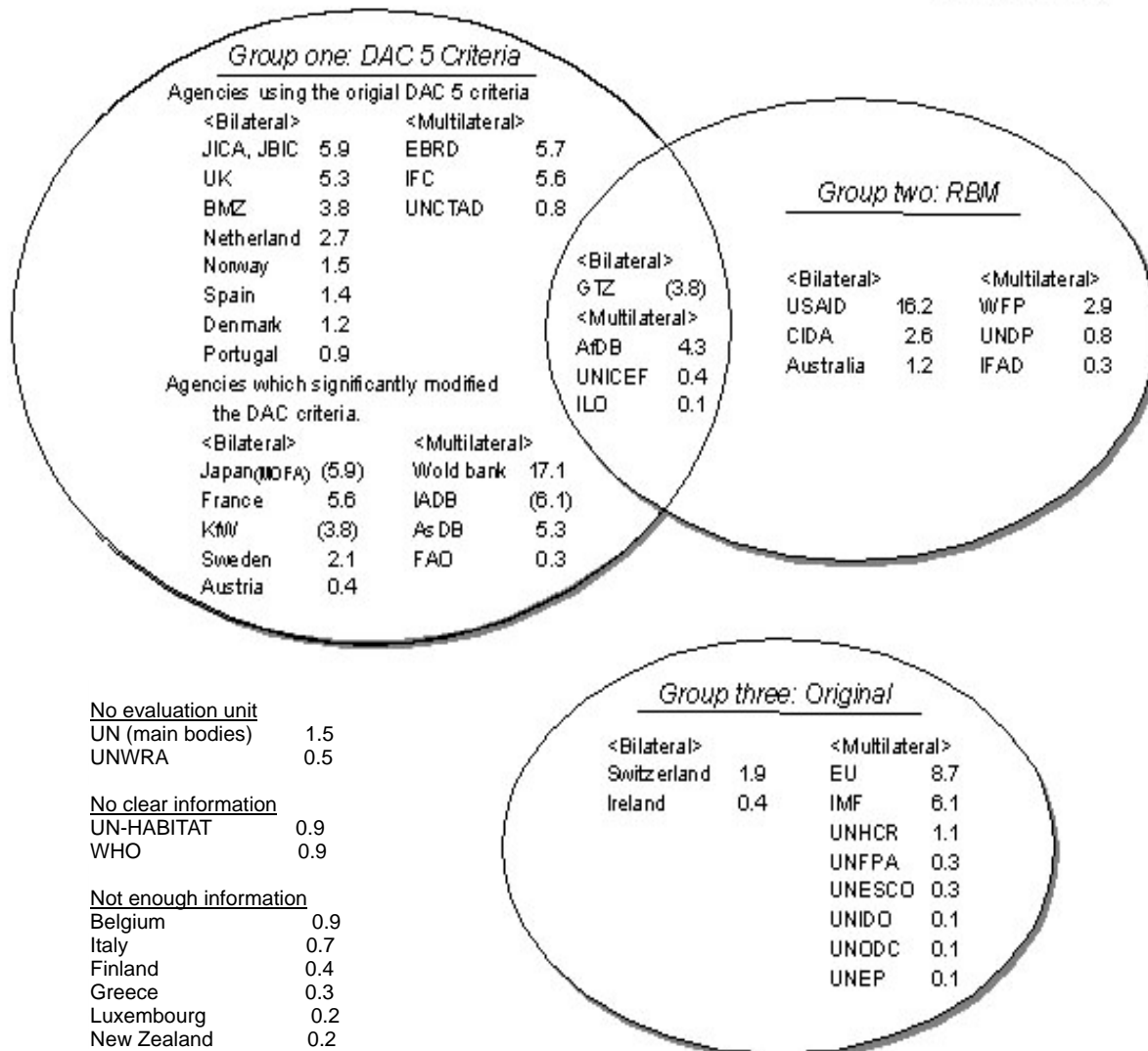
Some agencies developed their own evaluation approaches, based on their original philosophies of aid. For example, the Development Cooperation Ireland (DCI) has the following criteria: (i) the value of the results to the intended beneficiaries (in particular the poor, women and other disadvantaged groups) within the context of locally-owned processes of sustainable development and (ii) value for money of all Irish Aid expenditure.

Several multinational aid agencies also use their own criteria because they see specific characteristics of their aid targets, such as refugees, drugs, or environment. The EU does not have a unified evaluation approach, because a different EU member agency takes the lead in each evaluation project. This group includes Switzerland, Ireland, IMF, UNHCR, UNFPA, UNESCO, UNIDO, UNODC, and UNEP.

Figure 3.

Grouping by aid evaluation system

(US\$ bill. 1994)



The rest

The rest constitute agencies which seem not to have an evaluation unit,

including the UN (main bodies) and UNWRA. Although UN-HABITA mentions the existence of an evaluation unit, no information about evaluation can be found in its annual reports and website. Moreover, evaluation result from the WHO cannot be found on its website.

Several non English-speaking countries do not offer enough information on their Web sites or the documents published by DAC. These countries include Italy, Belgium, Finland, Greece, and Luxembourg. Also New Zealand only provides very brief information on evaluation, since its evaluation unit has just been established. Thus, these countries cannot be categorized into any of the three groups at this time.

Some conclusions for improvement of aid evaluation

Identification of Consumers' Value Premises

Early on, Hayes (1959) defined: “evaluation is firstly—and necessarily—a body of concepts and practices...which are applied in such a way that they can contribute to the improvement of practical activities” (p.16). More recently, OECD (2002) defines evaluation as “the systematic and objective assessment of an on-going or completed project, programme or policy, its design, implementation and results. The aim is to determine the relevance and fulfillment of objectives, development efficiency.” (p.22)⁸.

However, both definitions are unclear about their viewpoint. In other words, whose values and criteria should be applied in evaluation? Scriven, the only philosopher the evaluation community has (Stake, 1982, pp. 10-14), states that

evaluation is the “determination of merit, worth, or significance of things” (Scriven, 1980, p.3; 2006, p.1) and proposes that consumers’ values should be identified and used to determine the merit, worth or significance of evaluands (i.e., that which is to be evaluated). This point would divide evaluation from general research. It was said throughout this study that most evaluation reports simply picked up and rephrased the goals and objectives that were stated in the program/project planning document without any doubt. The result caused by this practice is the long-held suspicion, *does aid work?* Without sincerely identifying the consumers’ values, specifically needs, and including them into aid evaluation, the aid community will continue to face the same question⁹, *does aid work?* The rise of NGOs should be understood as the natural result of this biased practice, and the criticism of the “iron triangle” must be seriously considered, because of the significant possibility of biased practice. Needless to say, professional and technical assistance for consumers to identify their values might be important and necessary. Also the participatory approach in aid evaluation can be seen as a trial of inclusion of consumers’ or users’ values. It is natural that participatory approach has become dominant or essential part in aid evaluation these days.

Catch up with new trends in aid

As reviewed, the philosophies and types of aid have been shifting very dynamically in response to changed needs of aid. In contrast, corresponding developments in evaluation theory and practice were sometimes delayed or failed to provide satisfactory answers to the questions raised from the side of decision-makers, designers, implementers, and consumers. Now, the most

recent trend in aid is clearly the sector-wide approach. There is a great need to develop new frameworks and methodologies suitable to appropriately evaluate the effectiveness of sector-wide programs most importantly those that consider the viewpoint of consumers.

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<http://evaluation.wmich.edu/jmde/>

Articles

Annex A.

Summary of Activities, Criteria, Type of Evaluation

No.	Group	Country	Agency	The year aid started	The year Eval Office Established	Volume of Aid (year) (US\$m mil)	Volume of Eval (year)	Annual Eval Report	Eval Guide-lines	Type of evaluation	Comments
Bilateral agencies											
1	Bilateral	U.S	USAID (called ECA until 1950)	1951	1979	19,705 (2004)	167 (2004)		X	RBM	A review of its evaluation experience was available.
2	Bilateral	Japan	Ministry of Foreign Affairs	N/A	1981	8,906 (2004)	12 (2004)	X	X	DAC Criteria+	
3		Japan	JICA	1962	1982	-	72 (2002)	X	X	DAC Criteria	
4		Japan	JBIC	1961	1975	-	47 (2002)	X	X	DAC Criteria	
5	Bilateral	France	Agence Française de Développement (AFD)	N/A	N/A	8,473 (2004)	37 001-02	X	X	Original	
6	Bilateral	U.K	DFID	1948	N/A	7,883 (2004)	10 (2003)		X	DAC Criteria	DFID recently accepted DAC criteria (2005)
7	Bilateral	Germany	Min. of Eco. Coop. & Dev. (BMZ)	1961	1970	7,534 (2004)	11 (2004)			DAC Criteria	
8		Germany	GTZ	1975	N/A	-	2 (2004)		X	DAC Criteria & RBM	GTZ recently accepted RBM system
9		Germany	KfW	1961	N/A	-	N/A (2004)		X	Original	Rating and weighting are employed
10	Bilateral	Netherlands	Ministry of Foreign Affairs	1949	1977	4,204 (2004)	5 (2004)			DAC Criteria	Rich sector-/theme-specific evaluations
11	Bilateral	Sweden	SIDA	1961	1970	2,722 (2004)	38 (2004)	X	X	DAC Criteria+	A review of its evaluation experience was available.
12	Bilateral	Canada	CIDA	1968	1970	2,599 (2004)	5 (2004)		X	Original & RBM	CIDA prepared the DAC criteria in 1991
13	Bilateral	Italy	Ministry of Foreign Affairs	1978	N/A	2,462 (2004)	4 (2003)		?		Very limited information
14	Bilateral	Spain	Ministerio de Asuntos Exteriores Y De Cooperación	N/A	1998	2,437 (2004)	2 8-2004		X	DAC Criteria	
15	Bilateral	Norway	NORAD	1971	N/A	2,199 (2004)	6 (2004)	X		DAC Criteria	In 2004, NORAD became responsible of aid evaluation. The annual report is just a collection of summaries of respective evaluations.
16	Bilateral	Denmark	Ministry of Foreign Affairs	1971	1982	2,037 (2004)	7 (2004)		X	DAC Criteria	Annual report is a multi-year report.
17	Bilateral	Switzerland	SDC	1961	N/A	1,545 (2004)	4 (2004)	X		Original	More impact-evaluation-type approach
18	Bilateral	Belgium	Ministry of Foreign Affairs	1971	1971	1,463 (2004)	N/A (2004)			?	
19	Bilateral	Australia	AUSAID	N/A	Before 1983	1,460 (2004)	2 (2004)		X	RBM	
20	Bilateral	Portugal	PAD	N/A	1998	1,031 (2004)	3 (2004)	X	X	DAC Criteria	
21	Bilateral	Austria	Federal Ministry of Foreign Affairs	N/A	N/A	677 (2004)	1 (2004)		X	DAC Criteria +	
22	Bilateral	Finland	Ministry of Foreign Affairs	N/A	N/A	655 (2004)	2 (2004)			?	Multi-year sector evaluations are conducted
23	Bilateral	Ireland	DCI	N/A	N/A	607 (2004)	12 (2004)			Original	Value for money & the value to beneficiaries are employed as criteria
24	Bilateral	Greece	Ministry of Foreign Affairs	N/A	N/A	465 (2004)	N/A (2004)			N/A	Very limited information
25	Bilateral	Luxembourg	Ministry of Foreign Affairs	N/A	N/A	236 (2004)	N/A (2004)			N/A	Very limited information
26	Bilateral	New Zealand	NZADF	N/A	N/A	212 (2004)	N/A (2004)	X		N/A	Very limited information. Annual report is the organizational evaluation.

No.	Group	Agency	The year aid started	The year Eval. Office Established	Volume of Aid (US\$mill.)	(year)	Volume of Eval.	(Year)	Annual Eval. Report	Eval. Guide-lines	Type of evaluation	Comments
Multinational agency Type I: Loan agencies					50,123							
27	Multi: Loan	World Bank	1944	1973	17,045	(2004)	Approx. 90	(2004)	X	X	DAC Criteria++	Modified DAC criteria much. Employed Rating system.
28	Multi: Loan	IMF	1944	2001	6,137	(2004)	4	(2004)	X		Original	
29	Multi: Loan	IADB	1959	1999	6,100	(2004)	22	(2004)	X	X	?	Only guideline for country evaluation is developed
30	Multi: Loan	EBRD	N/A	N/A	5,662	(2004)	29	(2004)	X	X	DAC Criteria	Employed random selection
31	Multi: Loan	IFC	1956	N/A	5,630	(2004)	3	(2004)	X		Original	
32	Multi: Loan	ADB	1966	N/A	5,239	(2004)	36	(2003)	X	X	DAC Criteria+	Employed Rating and Weighting.
33	Multi: Loan	AfDB	1964	N/A	4,310	(2004)	16	(2004)	X	X	DAC Criteria+ & RBM	9 evaluation guidelines are available.
Multinational agency Type II: The UN agencies					9,963							
34	Multi: UN	WFP	1963	1965	2,900	(2004)	21	(2004)	X	X	RBM	Moves to RBM
35	Multi: UN	UN (main bodies)	1945	Not exist	1,483	(2004)	N/A					No evaluation unit exists.
36	Multi: UN	UNHCR	1951	1999	1,054	(2004)	13	(2004)		X	Original	
37	Multi: UN	WHO	1948	Not exist	893	(2004)	N/A					No evaluation unit exists
38	Multi: UN	UNDP	1966	N/A	842	(2004)	6	(2004)	X	X	RBM	Four guidelines are prepared for the UN members
39	Multi: UN	UNRWA	1949	Not existed	484	(2004)	N/A					No evaluation unit exists
40	Multi: UN	UNICEF	1946	N/A	437	(2004)	10	(2004)		X	DAC criteria & RBM	
41	Multi: UN	FAO	1945	1968	375	(2004)	35	(2004)	X		DAC criteria++	
42	Multi: UN	UNFPA	1969	2003	332	(2004)	31	(2003)	X	X	Original	
43	Multi: UN	IFAD	1978	N/A	311	(2004)	11	(2004)	X	X	RBM	
44	Multi: UN	UNESCO	1946	2001	305	(2004)	at least 14	(2003)	X	X	Original	
45	Multi: UN	ILO	1919	2005	138	(2004)	5	(2004)		X	DAC criteria & RBM	Brief guideline is available.
46	Multi: UN	UNIDO	1966	N/A	99	(2004)	7	(2004)			Review	
47	Multi: UN	UN-HABITAT	1978	N/A	93	(2004)	N/A	(2004)			Original	Doubtful about existence of any evaluatio unit
48	Multi: UN	UNODC(UNDCP)	1991	N/A	84	(2004)	14	(2004)	X	X	Original	
49	Multi: UN	UNCTAD	1964	N/A	75	(2004)	1or2	(2004)	X		DAC criteria	
50	Multi: UN	UNEP	1973	1985	58	(2004)	150	(2004)	X	X	Original	20 ex-post evaluations + 130 self-evaluations
Multinational agency Type III: EU												
51	Multi: EU	EU (Europe Aid Co-operation Office)	N/A	N/A	8,704	(2004)	12	(2004)			Various	A different member agency take a lead for each EU evaluation

1 The taskforce was a Joint Ministerial Committee of the Boards of Governors of the World Bank and International Monetary Fund, which members were governments of Belgium, Canada, Costa Rica, Dominican Republic, Finland, France, Germany (Federal Republic), India, Indonesia, Italy, Japan, Kuwait, Netherland, Saudi Arabia, Senegal, Tanzania, United Kingdom, United States. The World Bank acted as the Task Force's Secretariat. (Cassen, 1994, p.vi)

2 The gap between the DAC's statistics and this summed figure would consist of (i) contributions by the member countries, most of which are developing countries and not listed in DAC statistics, (ii) some amounts that bilateral governments did not report to the DAC, regardless of intentionally or unintentionally, (iii) the transfers among the U.N agencies (e.g., UNDP provided a part of its fund to other U.N agencies), and (iv) some amounts that the private volunteers contributed to the U.N agencies and programs, such as the one by Ted Turner, a founder of CNN.

3 The EU member countries that made financial contributions for its aid activity sited in the DAC statistics (2004) include France, Germany, England, Italy, Spain, Netherland, Belgium, Sweden, Austria, Denmark, Greece, Finland, Portugal, Ireland, Poland, Czech Republic, and Luxembourg.

4 The example of respective review includes: Cracknell, B. (2000) for the history of aid evaluation of the U.K with his experience of OECD-DAC; The Operation Evaluation Division of the World Bank (2003) for the experience of the World Bank; Clapp-Wincek, C. & Blue, R. (2001) for the history of USAID; Beurden, J.v. & Gewald, J.B. (2004) for the history of Netherland with some information of other continental European countries; and Fuhrer, H. (1996) for the general history of aid activities of each DAC member countries

5 Hayes (1959) suggests four steps: (i) Describing the development project and specifying goals; (ii) Deciding what data to use to indicate project results; (iii) Collecting the data – before, during, and after; (iv) Analyzing and interpreting findings. This monograph is now downloadable from the UNESCO's website for free.

<http://unesdoc.unesco.org/images/0006/000643/064341eo.pdf#search=%22evaluating%20development%20projects%20hayes%22>

6 They are twins but not clones (Rossi, Lipsey and Freeman, 1999).

7 It might be said that their ideas were inspired by the general trend of market-based reform. Actually they gave their ideas the label of “American Perestroika”.

8 The definition of evaluation in OECD (2002) consists of various sub-definitions. One of them is “Evaluation also refers to the process of determining the worth or significance of an activity, policy or program.” Though this sub-definition is similar to the Scriven's definition, it is not clear why the term of merit is not included.

9 One good exception of this situation can be cited in the evaluation guides of Ireland. The evaluation guidance of Development Cooperation Ireland (DCI) stated one of the role of DCI is to assess the value of the results to the intended beneficiaries (in particular the poor, women and other disadvantaged groups) within the context of locally-owned, directed and implemented processes of sustainable development.