

Terms of Reference
CCIC Reference Group on Evaluation of Development Effectiveness (ERG)
September 2008

Background

1. At the CCIC Leadership Forum (January 2008) and during the last members' meetings, members expressed interest in pursuing an exploration, with CCIC support, of methodologies/approaches to assess the results/development effectiveness of civil society organizations (CSOs). This could be a proactive response to current dissatisfactions and frustrations with results-based management (RBM), and potentially a way to come up with complementary or alternative approaches. CCIC agreed to create a reference group of members to accompany this work.
2. Marc André Fredette, Director of Performance Management at CIDA (who moderated the Leadership Forum panel on evaluating development results) has been leading an internal process at CIDA to respond to the OECD Development Assistance Committee report on the Agency that emphasized the complexity of its tools. As CIDA implements its new RBM policy, the CCIC Reference Group could provide civil society feedback and input.
3. The work of the Reference Group will be done in coordination with the work of CCIC in the global multi-year Open Forum for CSO Development Effectiveness. This CSO-led, multistakeholder initiative will elaborate CSO effectiveness principles, focusing on CSOs' diverse roles as development actors. CCIC is a member of the Forum's Global Facilitation Group. Brian Tomlinson and Anne Buchanan are the CCIC staff involved in the work of the Open Forum.
4. A key guiding tool for the work of the Reference Group is the CCIC *Code of Ethics*.
5. In May 2008, CCIC made a call to the CCIC members (through *Flash*) for indications of interest in the reference group. Seven colleagues from the membership were invited to be part of the Group given their interest and relevant experience with accountability frameworks and methods of evaluating development impact, including results-based management.

Members of the Reference Group

Julia Anderson – Jamaican Self Help Organization
Theo Breedon – CUSO-VSO
Gilio Brunelli – Canadian Catholic Organization for Development and Peace
Mohammed Chikhaoui – Oxfam Québec
Anna Nitoslawska – Canadian Labour Congress
Will Postma – Save the Children Canada
Jean Symes – Inter Pares
Esperanza Moreno – CCIC
Ann Simpson – CCIC

The Reference Group could expand to a maximum of 10 people if the initial group thinks that additional perspectives could be added from particular kinds of overseas and Canadian programs, or from key clusters/affinity groups within the CCIC membership.

Members of the group commit to attending meetings and reviewing and producing documents.

Mandate of the Reference Group

To provide advice and guidance to CCIC in the process of exploring methodologies and accountability frameworks to assess CSO development results and effectiveness.

This process is aimed at supporting CCIC's work related to two distinct but complementary purposes:

1) To support/encourage members interested in using evaluation as a **learning** tool to improve their practice and for capacity strengthening (generating knowledge, using field knowledge, encouraging analysis of failures as well as successes, becoming learning organizations): mostly for internal purposes related to organizational development.

2) To contribute to discussions (in Canada with CIDA, and internationally) about results-based approaches for purposes of **accountability** (upward to donors, downward to partners, communities and people with whom CSOs work). This part of the work can be seen as more focused on external purposes: measurement of intended outcomes to demonstrate progress, to prove that, as CSOs, we are taking responsibility for resources that are given to us, and to provide means for others (such as CIDA and partners) to hold us responsible for our actions.

The process will include:

- Research (to be conducted by CCIC staff and consultants):
 - Mapping relevant national and international initiatives
 - Mapping relevant practices of donor agencies in other jurisdictions
 - Deepening some cases by interviewing key national and international resource people
 - Discussions with the Canadian development evaluation community (consultants, IDRC, CSOs including members of the CCIC reference group, CIDA) regarding their experiences
- Engagement with CIDA:
 - To improve understanding of CIDA's approach and rationale for RBM as an accountability tool and how the Agency uses the accumulated RBM information, provided by its partners in the context of funding agreements, for its analysis, policy development and programs.
 - Contributions to CIDA's process of implementing its new RBM policy, including guidance on principles for application of RBM in CSO programming (e.g. CPB-funded responsive programming), identification of possible pilot projects to integrate other approaches with the RBM framework.
- Linking as appropriate with the process of the international Open Forum for CSO Development Effectiveness.

- Engagement with CCIC members on initiatives and good practices for monitoring and evaluating CSOs' development effectiveness, in the context of programs and international civil society partnerships.

Outputs

The products of this work are anticipated to be:

- Research paper on relevant national and international initiatives
- Possible guidelines or reporting models for CSOs to be discussed with, and proposed to, CCIC members
- Proposals on how to make CIDA's RBM requirements more relevant to the principles and roles that enable CSOs' development effectiveness
- Processes with members for sharing and discussion (2009-2010)

Meetings

First meeting: September 9, 2008. The context and the group's terms of reference. Subsequently, meetings approximately every two months, as appropriate.

CCIC's role (led by Esperanza Moreno and Ann Simpson):

- Preliminary research on evaluation methodologies: issues and challenges, "the lay of the land" and assessment of the relevance of various methodologies for our needs. Short research paper.
- Socialize research findings with reference group.
- A possible learning circle or other process with members.
- Liaison between reference group and CIDA re opportunities for dialogue, and re contributions to CIDA's implementation of its new RBM policy.
- Recommendations for CIDA: guidelines, reporting model, possible pilot projects.
- Coordination between this work and CCIC's work with the Open Forum for CSO Development Effectiveness.