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1. Introduction

This paper provides an overview on the model for Monitoring and Evaluation employed in the Government of Canada, pointing to how the concepts have evolved and key ‘lessons learned’ from more than thirty years of public sector experience.

2. The evolution of M&E in Canada

In Canada, the concept of ‘Monitoring and Evaluation’ (M&E) is interpreted such that evaluation (the ‘E’) has a distinct identity from monitoring (the ‘M’). This is not always true in other parts of the world where the term M&E may ignore or minimize the concept of ‘evaluation’.

In fact, ‘evaluation’ in public sector management in Canada precedes by many years notions of ‘outcome monitoring’. It goes back to 1969, with the initiation of formalized and centralized evaluation practices. That initial approach to centrally-led evaluation was replaced in 1977 with the first government-wide Evaluation Policy that established the model upon which the practice of evaluation still functions in the Government of Canada.

Generally speaking, the introduction of the practice of evaluation was inspired by the notion of ‘letting the managers manage’; that is, allowing deputy ministers of federal government departments to assume greater responsibility of their departments and programs, but also being accountable for the performance of those programs and the prudent use of public funds. The model is based on a strong central management board that oversees and holds deputies accountable. And, one of the mechanisms to do this would be performance evaluation.

Over the past thirty + years however, many changes have occurred with Policy, practices and standards of evaluation in Canada. The Policy for instance has been updated on three occasions - 1991, 2001 and 2009. Changes in the Policy occurred for a variety of reasons: as the needs for evaluation or performance measurement evolved or became clearer; as M&E practices matured; and/or as the demands of the system through public sector reform put emphasis on new areas (as for example, the widespread introduction of results-based management, RBM, in the nineties and 2000s).

The 1990s saw an increased move to performance monitoring and high-level reporting in an attempt to make performance information more accessible and useful to Parliamentarians and Parliamentary Committees. A formal requirement for each government department to annually submit a Departmental Performance Report (DPR) to Parliament had the impact of placing new emphasis on program managers (and not simply technical experts such as Evaluators) to be more accountable for measuring and reporting on the performance of their programs. Associated with this was a new emphasis on the measurement of ‘outputs’ and ‘outcomes’, and not simply ‘inputs’ (i.e. resources expended) when reporting on
‘performance’. As with the Evaluation function, the central agency (TBS) has played quite an active role in providing guidance and oversight over performance reporting and the production of DPRs across the system.

Unlike some of the other OECD countries, which significantly reduced the role of evaluation during their reform of public sector management, Canada held the view that the two tools (‘evaluation’ and ‘performance monitoring’) were complementary, and not competing, tools within the performance measurement toolkit.

The 2000s have seen two attempts to revitalize the Evaluation function, with updated Policies in 2001 and again in 2009. In line with the government’s modern management agenda, as articulated in Results for Canadians, Evaluation and Performance Monitoring (as well as Internal Audit) are being seen as key tools to help ensure a ‘results’ focus, responsible spending and greater transparency and accountability across government.

Table 1 provides highlights of key elements in the evolution of M&E in Canada.

<table>
<thead>
<tr>
<th>Key Features</th>
<th>Canadian Experience</th>
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<tbody>
<tr>
<td>Initiation of formalized evaluation practices</td>
<td>1969</td>
</tr>
<tr>
<td>Government-wide Evaluation Policy introduced</td>
<td>1977</td>
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</table>
| Drivers of ongoing performance monitoring and reporting (date introduced) | • Departmental Performance Reports, DPR (1995)  
• Results based Management and Accountability Frameworks, RMAF (2000)  
• Management Accountability Framework, MAF (2003)  
• Management Resources and Results Structure, MRRS (2006) |
| Key drivers of change in emphasis on governance tools | • Public sector reform  
• Fiscal restraint  
• Government Management Agenda: ‘Results for Canadians’ |
| Current emphasis on evaluation capacity | • Formalized role within each department  
• Central management (guidance and oversight) of the function (Centre of Excellence for Evaluation, CEE) |
| Current emphasis on governance tools | • Evaluation (program and policy)  
• Performance Monitoring  
• Internal Audit  
• Strategic Reviews |
3. The Canadian M&E System – An Overview

3.1 Many uses and users of M&E information

As noted above, the intent of monitoring and evaluation in the Canadian system is to provide ‘results’ information that will serve a variety of needs and users at different levels throughout the system.

At an operational level in departments, monitoring and evaluation would be expected to serve as ‘learning tools’ to assist in program improvements and sound management practices.

At the level of an individual department, with the deputy head accountable for good governance and performance of the department, M&E represent key management and accountability tools available to the deputy head, as well as providing important inputs to strategic reviews that may be needed in making management decisions re program priorities and possible changes.

At a government-wide level, the central agency, the Treasury Board Secretariat (TBS), is an important player regarding the production of M&E information, as well as its use in informing funding decisions about certain programs (grants and contribution programs subject to funding renewal) and government-wide expenditure management.

Finally, in a legislative context, M&E information about government programs and operations is reported directly to Parliament on an annual basis via Departmental Performance Reports (DPRs) and an overview performance report, Canada’s Performance. The intent is to enhance the transparency and accountability of government operations with Parliamentarians and Canadians in general. More detailed discussion about the performance of government programs or government operations may take place in the various Parliamentary Committees that have the authority to seek additional information or clarification directly from the relevant departments.

3.2 Roles and responsibilities in Canada’s M&E system

Within the Canadian M&E system, there are two key focal points for the delivery and use of M&E information – the individual government departments and the central agency, the Treasury Board of Canada Secretariat (TBS).

The central agency plays a strong and proactive role for both the practice of evaluation as well as performance monitoring within departments. Within the TBS resides the Evaluation policy centre, the Centre of Excellence for Evaluation (CEE). This unit plays a variety of roles in support of evaluation capacity building and its use, as well as providing operational oversight regarding standards and quality of evaluation practices and products. With the new 2009 Policy, TBS can now direct the conduct of government-wide evaluation studies. TBS also provides guidance, proactive support and oversight for performance monitoring.
that takes place in departments. Finally, TBS serves to link evaluation to inform program funding decisions and the broader Expenditure Management System.

For individual government departments and agencies, deputy heads are required to provide dedicated resources for establishing an Evaluation capacity appropriate to their organization. While there is flexibility in the resourcing of the Evaluation function, the central agency (TBS/CEE) monitors this, as well as ensuring that each department puts in place the Evaluation infrastructure required under the Policy; that is, a senior-level Evaluation Committee; annual and multi-year planning for Evaluation; a departmental Evaluation Policy reflective of the government’s Policy; and, the mechanisms needed for follow-through on delivery of credible evaluation products.

Part of the Evaluation infrastructure in any department is the Evaluation Unit, led by the ‘Head of Evaluation’. This position plays a pivotal role in ensuring that the requirements of the government’s Policy as well as the priorities of the deputy head are reflected in the work of the departmental Evaluation function. The position generally reports to the deputy head or, at least, to help ensure ‘independence’ of the departmental evaluation function, has direct access to the most senior official in the department.

Deputy heads of departments are also accountable for establishing a corporate performance framework (the so-called Management Resources and Results Structure, MRRS) that links all programs of the department to the expected outcomes. This then serves as the basis for performance monitoring and reporting and its development is monitored closely by TBS to ensure adherence to the MRRS Policy of government. Performance monitoring is an ongoing responsibility of individual program managers, though development of the underlying program logic model and identification of appropriate performance indicators often comes about with the assistance of the Evaluation specialists. In theory, ongoing performance monitoring will provide much of the needed data for the eventual evaluation of a program; in practice though this does not always happen.

The national audit office, the Auditor General of Canada (AG) also plays an important role in providing oversight of the effectiveness of evaluation and performance reporting; that is, by examining the use of the function across the system and the ‘quality’ of performance reporting. As an independent auditor and reporting directly to Parliament, the reports of the AG serves to raise the profile of M&E and its use in the public sector. Its reports generally receive public attention and provide constructive advice to individual departments as well as to the central agency. Historically the AG has been a strong supporter of the central agency role as a champion and facilitator of departmental evaluation.

The other key group implicated by M&E is represented by elected officials. Parliamentarians may be exposed to M&E information in various ways: via the annual tabling of Departmental Performance Reports and the strategic-level report, Canada’s Performance; through more detailed discussions that may take
place in the context of a Parliamentary Committee; or via discussion among TB Ministers on programs seeking funding renewal or broader-based expenditure review exercises. Often though, more exposure is given (via the media) to results emanating from internal and external audits of government operations. Clearly though, the public sector reform agenda of the government (including fiscal restraint) has over the past thirty+ years had a major impact on the direction of evaluation and performance monitoring.

**Figure 1** provides an overview of the Canadian M&E system.

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**Figure 1: An Overview of the Canadian M&E System**

- **Parliament of Canada**
- **Auditor General of Canada**
- **Parliamentary Committees**
- **Treasury Board Secretariat (TBS)**
- **Federal Departments & Agencies**

**Treasury Board Secretariat (TBS)**
- Policy centre for Evaluation, performance monitoring & reporting, results based management (RBM), Internal Audit
- Centre of Excellence for Evaluation (CEE)
- Capacity building, guidelines, standards and norms
- Oversight of M&E products from departments & agencies
- Prepare national performance report, *Canada’s Performance*, tabled in Parliament
- Can direct government-wide evaluation studies
- M&E to inform Expenditure Management System (EMS)

**Federal Departments & Agencies**
- **Deputy Head** accountable for performance of the organization & good governance
- Uses Evaluation function and performance monitoring & reporting tools
- **Head of Evaluation** leads departmental Evaluation function, as per TBS policy & standards
- **Departmental Evaluation Committee** senior-level committee determines priorities for evaluation, monitors use and follow-up to evaluation studies
- Department required to establish a corporate performance framework (Management Resources and Results Structure (MRRS))
- **Program managers** required to develop & implement ongoing performance monitoring of their programs
- Department/Deputy Head assessed annually against a comprehensive Management Accountability Framework (MAF) that includes quality of M&E information
- M&E information used for both internal accountability & management and external accountability and reporting to TBS and Parliament
3.3 Some key features of the M&E system

As noted above, the Canadian M&E system is one that has invested heavily in both evaluation and performance monitoring as key tools to support accountability and results based management. Performance monitoring provides managers with an ongoing assessment of how programs are performing, while evaluation provides a deeper understanding of performance and whether adjustments might be needed. Both serve to advise deputy heads on how well their departments are functioning and inform Parliamentarians on the performance of government operations.

The responsibility for M&E in a government department falls on both technical staff (i.e. Evaluators) and non-technical officials (i.e. program and senior managers) in the department. The intent is that M&E becomes integrated into the decision-making of the department and serves as a key driver in moving the organization towards a ‘results’ culture.

Figure 2 shows the organizational arrangements for M&E within a government department.

![Figure 2](image-url)
The current state of the M&E system is one that has evolved over time, as the central designers have recognized that the development and implementation of M&E is long-term and iterative. This puts emphasis on the ‘process’ of implementation as an important mechanism in itself in developing an ‘evaluation culture’ or ‘results culture’ in an organization and across the full system.

The introduction of a number of centrally-driven administrative policies that have served as key ‘drivers’ for both monitoring and evaluation over the 1990s and 2000s have generally been phased-in (i.e. ‘piloted’ in select departments) so as to allow a period for learning and adjustment prior to their system-wide roll-out.

The broad goal in investing in an M&E system has been to generate and use ‘results’ information that supports the government’s management agenda from the perspective of both ‘learning’ and ‘accountability’ in the design and delivery of government policies, programs and services and the use of public funds. In this way, ‘performance reporting’ generally aims to ‘tell a performance story’ rather than simply reporting on a limited set of indicators in the context of an accountability ‘scorecard’. Further, it is recognized that evaluation serves to ‘inform’ decision-making, rather than expecting that decisions will rest solely on the results of an evaluation study.

The model for the use of evaluation in the Canadian system relies on a strong central presence in setting the policy, standards and guidelines for the conduct of evaluation. Most evaluation studies are carried out by Evaluation units that are internal to departments, though the new 2009 Policy allows for centrally-driven and government-wide evaluations. To reinforce ‘independence’ of Evaluators, so that they may ‘speak truth to power’, there are a number of elements in the model aimed at ensuring objectivity and neutrality of the evaluation process and the reporting on results.

Table 2 identifies some of the key features of the Canadian M&E system that reinforce the credibility and quality of the practice of monitoring and evaluation.

## Table 2

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
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<tr>
<td>Where is the emphasis placed - on the ‘M’? the ‘E’? or both?</td>
<td>• Balanced emphasis &amp; active support for both ongoing monitoring &amp; ad hoc evaluation&lt;br&gt;• Program managers accountable for performance monitoring; Evaluation ‘specialists’ within departments accountable for more probing evaluation studies&lt;br&gt;• 2009 Policy gives TBS authority to conduct government-wide evaluations&lt;br&gt;• Deputy head of a department or agency accountable for high organizational performance and delivering on expected ‘results’ – uses both the ‘M’ and the ‘E’ (as well as Internal Audit) to support this – some flexibility in the resourcing of tools, so as to be appropriate to the size and needs of the organization</td>
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| How formal is the basis for the M&E requirements? | • M&E requirements are based on administrative policies (allows more flexibility than legislation to modify and improve the policy as experience is gained over time)  
• Identifies roles and responsibilities for all the key players and expectations for the system  
• Current basis relies on several centrally administered policies and procedures: Evaluation Policy; annual requirement to report to Parliament via the DPR; Management Resources and Results Structure (MRRS) Policy requiring each department to develop a corporate performance framework and reporting structure; Policy on Transfer Payments (revised 2008); program & strategic-level Performance Frameworks (RMAFs); annual departmental assessment by TBS via the Management Accountability Framework (MAF) |
| --- | --- |
| What capacity building efforts exist? | • Proactive M&E capacity building efforts from the central agency  
• Expectation that deputy heads will resource M&E to the level appropriate to their department/agency – central agency provides both guidance as well as monitoring/oversight  
• For Evaluation, creation of the Centre of Excellence for Evaluation (CEE) has provided a system-wide ‘champion’ to lead various capacity building efforts (formalized training & workshops; a network/forum for heads of Evaluation; etc.)  
• Professional association (Canadian Evaluation Society, CES) actively leads training and development and, recently, an initiative to identify competencies for Evaluators  
• For performance monitoring and reporting, TBS has issued and updated guidelines over the years, initially working with ‘pilot’ departments and ‘phasing in’ the introduction of reporting requirements for departments – intent was to implement in pilots, learn, adjust and re-issue guidelines on a broader basis. |
| Who conducts evaluation studies? | • Internal evaluation units within government departments and agencies  
• New Evaluation Policy (2009) recognizes resource constraints for smaller departments and agencies – some special considerations, though evaluation is still a requirement  
• Central agency (TBS) may dictate a department to undertake a specific evaluation or initiate a government-wide evaluation – new requirement in 2009  
• Conduct of individual studies may be through use of internal Evaluators, private sector consultants or a combination |
| What ‘quality control’ and oversight mechanisms exist? | • The TBS Centre of Excellence for Evaluation (CEE) monitors the planning and conduct of evaluation in individual departments; including evaluation coverage and quality of evaluations  
• TBS reviews annually the incoming performance reports (DPR) from each department/agency prior to their tabling in Parliament  
• Through the MAF process, TBS assesses each department/deputy head annually against a number of criteria (including the use of ‘results and performance information’)  
• The Auditor General of Canada (AG) conducts periodic audits of how well the Evaluation Policy is being implemented across government; the state of results-based performance reporting and issues public reports to Parliament on the findings and recommendations  
• Formal requirement (2009) to conduct an evaluation of the government’s Evaluation Policy every five years. |
| How is ‘independence’ of the evaluator maintained? | • Evaluation function has “direct and unencumbered access” to the deputy head of the individual department or agency  
• ‘Neutrality’ of both the evaluation function and the evaluator (“impartiality in behaviour and process”) is stressed in the Evaluation Policy and by the government’s central Policy Centre (TBS/CEE)  
• Each department has a senior-level Departmental Evaluation Committee in place that plays a variety of roles re evaluation planning, conduct and follow-up |
• Departments may make use of external review panels (independent experts, for example) for the planning and conduct of individual evaluation studies
• Ongoing monitoring of the Evaluation function and individual studies by the TBS/CEE – an operational level oversight
• Oversight role played by the Auditor General, an independent body reporting directly to Parliament – very public disclosure of information that reinforces both ‘independence’ of the function and ‘transparency’.

<table>
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<th>How transparent is the information?</th>
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<tr>
<td>• Evaluation Policy stresses the importance of ‘transparency’. Formal requirement to post all Evaluation reports on the departmental web site</td>
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<td>• Annual Departmental Performance Reports (DPR) are public documents</td>
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<td>• Annual reports of the Auditor General are very public and generally receive wide attention in the media</td>
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<tr>
<td>• Access to Information legislation requires compliance with all external requests (general public, media, etc.) for public disclosure of government documents (some exceptions)</td>
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<tr>
<td>• Over time, the media has made increasing use of this access to publicize certain findings of particular audit or evaluation studies</td>
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4. Some ‘Lessons Learned’ from Thirty Years of M&E Development in Canada

There are many ‘lessons’ that could be drawn from the 30+ years of Canada’s experience with M&E. To help in drawing the broad implications, a set of lessons learned have been organized under three key headings below:

- Drivers for M&E
- Implementing the M&E system
- Key elements of capacity building

4.1 Lessons learned: Drivers for M&E

Developing M&E in an organization or a country requires a significant investment in time, resources (both HR and $) and energy. To be successful, there ought to be a real ‘need’ for M&E information. In Canada, much of this need has been driven by various public sector reform exercises and, most recently, the government’s management agenda, Results for Canadians.

There is sometimes a tendency to adopt unrealistic expectations in considering what evaluation and performance monitoring can deliver on, as might be the case in satisfying for example, a ‘political’ need. While M&E should serve an important place in public sector management, the expectations about how and when M&E can get used and what it can actually deliver on need to be tempered with reality, and generally remain modest.

Some lessons relating to the ‘drivers for M&E’ from the Canadian experience are provided in Table 3.
### Table 3

<table>
<thead>
<tr>
<th>Some Lessons Learned concerning ‘Drivers for M&amp;E’</th>
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<tbody>
<tr>
<td><strong>1.1</strong> Building and using M&amp;E capacity requires more than resources and technical skills—it requires a political will and sustained commitment - Central leadership and a plan are very important.</td>
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<tr>
<td><strong>1.2</strong> Think in terms of years, not months, to getting to a mature M&amp;E system.</td>
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<tr>
<td><strong>1.3</strong> ‘M&amp;E information’ is not an end in itself; it needs to be linked to particular management and decision-making roles, particularly in the context of public sector reforms or government agendas.</td>
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<tr>
<td><strong>1.4</strong> Clarify the distinction between the ‘M’ and the ‘E’ and what each contributes to results based management (RBM), and what each requires re capacity building.</td>
</tr>
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<td><strong>1.5</strong> To be effective, there is a need to build a capacity ‘to do’ evaluation (and gather performance information), plus the capacity ‘to use’ M&amp;E information within organizations and across the system. A supply of good evaluations is not enough to maintain a robust evaluation function. There needs also to be a realistic demand for evaluation.</td>
</tr>
<tr>
<td><strong>1.6</strong> The capacity to use M&amp;E information relies on the nature of the incentives in the system for managers to demand such information and actually use it as part of their normal operations. Incentives can take many forms, both ‘sanctions’ for not complying, as well as ‘rewards’ for meeting requirements.</td>
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<tr>
<td><strong>1.7</strong> It is important to manage the expectations for Evaluation and not create unrealistic expectations about its role. While Evaluation can and should inform decision-making, it is generally one of many sources of relevant information. Questions about the performance of government programs generally do not have simple ‘yes/no’ answers. Evaluations can and should provide useful information to inform debates about programs, their performance and future direction.</td>
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#### 4.2 Lessons learned: Implementing the M&E system

Implementation of M&E is long-term and iterative – and, not costless. As such, senior level commitment and ‘champions’ at both senior and operational levels are important elements to ensure sustainability through the long period of development and implementation. Over time, as an M&E ‘fatigue’ appears, as it surely will in some parts of the system, there need to be reminders of why M&E is important.

Eventually, the goal is to move M&E beyond the point of being a ‘special project’ and one where it is a normal part of doing business and the management practices of the organization. **Table 4** offers some lessons on ‘implementing the M&E system’ from the Canadian experience.
### Table 4

**Some Lessons Learned concerning ‘Implementing the M&E System’**

<table>
<thead>
<tr>
<th>Lesson</th>
<th>Description</th>
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<tbody>
<tr>
<td>2.1</td>
<td>There needs to be sufficient communication (and fora for information sharing) across organizations about the role of M&amp;E and how it can help management so as to link the demand for and supply of M&amp;E information; that is, to ensure that ‘what gets produced’ is ‘what is needed’, and delivered in a timely way.</td>
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<td>2.2</td>
<td>A formal Policy document is a useful basis for clarifying roles, responsibilities and accountabilities of key players - Deputy Heads, Evaluation specialists, program managers, central agency officials.</td>
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<td>2.3</td>
<td>The central agency ‘champion’ for the Evaluation function in government (the Centre of Excellence for Evaluation, CEE) has played a key role in the M&amp;E system – serving as the policy centre for evaluation; providing guidance; leading and promoting capacity development; providing oversight to help ensure quality control.</td>
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<td>2.4</td>
<td>In developing and implementing the M&amp;E system, a number of requirements have been ‘phased in’ by the central agency, under the general philosophy of ‘try, adapt, learn and adjust’. This lengthens the overall period of building the M&amp;E system, but allows for a period of learning and an ease of adjustment when needed without a major investment in re-orienting the whole system. An acceptance that it is long-term and iterative helps manage expectations.</td>
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<tr>
<td>2.5</td>
<td>In establishing internal Evaluation units in departments and agencies, allowance for some flexibility is important, to take account of the unique circumstances associated with each organization. Recognizing that ‘one size does not fit all’, deputy heads are given some flexibility in implementing the government’s Evaluation Policy, though all are equally accountable for the performance of their individual organization.</td>
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<tr>
<td>2.6</td>
<td>Oversight by the national audit office is important in giving broad and public exposure of how well the M&amp;E system is being implemented and whether adjustments are needed.</td>
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#### 4.3 Lessons learned: Building M&E capacity

A critical element associated with the sustainability of an M&E system relates to the adequacy of human resources (HR) with the needed skill sets. HR capacity development has and continues to be an ongoing issue addressed by the Canadian system.

Capacity building is aided by the existence of well-developed professional networks. In Canada there are two for the Evaluation function: (i) within government, where Heads of Evaluation in departments meet on a regular basis; and (ii) across the professional spectrum, with the Canadian Evaluation Society, CES, serving as a very active professional association representing Evaluators from the public, private and not-for profit sectors, including academics. A third association, the Performance and Planning Exchange (PPX) brings Evaluators and managers together on issues of results based management (RBM) practices. While these networks provide part of the enabling environment for professional development, it is equally important that time and resources are set aside to allow for the necessary training and development.
For its part, the TBS Centre of Excellence for Evaluation has a capacity building component as part of its mandate. This has resulted in the development of tools, guidelines and an ‘evergreen’ website. Additionally, the CEE has sponsored capacity building workshops, local and national learning events and spearheaded national training programs for new Evaluators.

The professional association of Evaluators in Canada, the CES, has recently completed an exercise of identifying competencies for evaluators, as a first step in addressing the issue of ensuring a supply of trained and credible professional evaluators.

Table 5 identifies a number of lessons from the Canadian experience that relate to dealing with ‘building M&E capacity’. It should be noted that, in considering training needs, it is also important to reflect on the training and orientation to M&E required for non-technical officials (i.e. the users of M&E information). Additionally, building capacity needs to address an oft-ignored area – data development and establishing credible data bases.

| Table 5 |
|-----------------|-----------------|-----------------|-----------------|
| **Some Lessons Learned concerning ‘Building M&E Capacity’** |
| **3.1** Building an adequate supply of human resource capacity is critical for the sustainability of the M&E system, and is generally an ongoing issue. It needs to be recognized though that ‘growing’ Evaluators requires far more technically-oriented M&E training and development than can usually be obtained via one or two workshops. |
| **3.2** Both formal training and on-the-job experience are important in developing ‘evaluators’. Two key competencies for Evaluators have been determined to be: cognitive capacity and communication skills. |
| **3.3** Program and senior managers are important audiences for less technical training on M&E and RBM. They need to have enough understanding that they ‘trust’ and will use M&E information. This type of broad training/orientation is critically important in building a ‘results culture’ within organizations. |
| **3.4** There are no quick fixes in building an M&E system - investment in training and systems development is long-term. Various options for training and development opportunities include the public sector, the private sector, universities and professional associations, as well as job assignment and mentoring programs. |
| **3.5** In introducing an M&E system, there need to be ‘champions’ and ‘advocates’ to sustain the commitment needed over the long term. Identifying ‘good practices’ and learning from others can help avoid the ‘fatigue’ that typically accompanies any change process, as enthusiasm starts to wane over time. |
| **3.6** Evaluation professionals possess the necessary skill set to play a key role in providing functional advice and guidance to departmental/agency managers about the design and development of appropriate results-based performance monitoring systems. While managers should be responsible for performance measurement/monitoring per se, a recognized role for Evaluators should be in providing such assistance and oversight on results measurement/monitoring. |
3.7 Ongoing performance monitoring (the 'M') and the conduct of ad hoc evaluation studies (the 'E') should be positioned so as to be complementary functions which support one another. Within organizations, this would mean that the measurement plans and strategies to put in place ongoing monitoring systems would be implemented so that sufficient performance information is available to effectively support the evaluation of programs. In so doing, organizations would make best use of the limited resources typically available for their measurement and accountability tools.

3.8 Data quality is critical for the credibility of an M&E system, but an area often not adequately dealt with. A data development strategy (at an organizational level or a national level) should be considered as part of the long-term strategy of building a credible M&E system. The national statistics office can be an important player in assisting data development.

3.9 Performance reporting is often required at different levels; that is, providing information about a particular program, a sector, a department or agency, or at a national-level. It is important to recognize the various audiences for performance reporting and their different needs; and, to tailor the level and breadth of reporting appropriate to those different levels.

5. Conclusion

‘Getting it right’ is a goal of every country that is engaged in implementing a system of monitoring and evaluation (M&E) to serve and support their public sector. While each country has its own unique circumstances, the ‘lessons’ from any one country can still be instructive in helping identify the approach and process best suited to another country.

In this regard, two broad conclusions emerge from the experience of Canada with M&E: one is that the road to ‘getting it right’ is a long one; and, secondly, the journey towards that goal is in itself important for the learning that comes with it and is gained along the way.