

## NAVIGATING UNCHARTED WATERS: PROJECT MONITORING AT CIDA

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**Abstract:** The Canadian International Development Agency (CIDA) has employed external monitors for many years to assist in measuring the performance of its projects. At first, this role was one of surveillance, with monitors expected to keep a distance from the implementing organizations. Today, in keeping with international trends in monitoring and evaluation, the monitoring role is, in theory, more participatory and improvement-oriented, requiring of monitors a different set of knowledge, skills, and attitudes. The role is nevertheless poorly defined, open to individual interpretation and made even more challenging when the monitoring involves measuring performance in relation to cross-cutting themes such as gender equality. This article presents many of the challenges inherent in monitoring and makes a case for a participatory approach aimed at learning and at program improvement. The authors call upon the evaluation community to undertake research and scholarly discourse in this area to guide successful practice.

**Résumé :** Depuis de nombreuses années l'Agence canadienne du développement international (ACDI) utilise des observateurs externes pour contribuer à la mesure du rendement de ses projets. Ce fut d'abord un rôle de surveillance, joué par des observateurs devant rester à l'écart des organisations de mise en œuvre. Pour refléter les tendances internationales actuelles dans les domaines du suivi et de l'évaluation, le rôle de suivi est, du moins théoriquement, davantage axé sur la participation et l'amélioration, exigeant que les observateurs fassent preuve de diverses connaissances, compétences et comportements. Ce rôle est cependant mal défini, ce qui laisse place à diverses interprétations. Par ailleurs, le défi

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s'intensifie lorsque le suivi porte sur des questions transversales, telles que l'égalité des sexes. Cet article présente nombre de défis propres au suivi, et préconise une approche participative visant l'apprentissage et l'amélioration des programmes. Les auteurs appellent la communauté évaluative à amorcer des recherches et un débat académique dans ce domaine, en vue d'améliorer la pratique.

■ The Canadian International Development Agency (CIDA) has a tradition of hiring external monitors to assist its program officers in assessing the performance of projects and programs. Little has been written about this function, at CIDA or elsewhere, and the agency has few tools to guide its monitors. As a result, there is considerable confusion and debate within CIDA about the role of monitors and their value. This article examines the monitoring function and illustrates how the monitor's role has changed in recent years as international development programming has become more complex and as governments have placed more emphasis on results-based management (RBM). The article presents the challenges inherent in this largely uncharted territory and suggests the need for standards.

The authors are consultants working for CIDA as monitors of a CIDA-supported environmental management project operating in eight countries of Southeast Asia. Together, they have more than 40 years of international development experience, including 12 years as monitors.

## THE CHANGING ROLE OF MONITORS

For many years, CIDA has hired external monitors to help track the performance of its projects and programs. Throughout the 1980s and well into the 1990s, external monitors played a largely surveillance role (CIDA, 1996), and CIDA viewed them somewhat as independent, third-party sleuths. Monitors were at arm's length from projects and reported only to CIDA managers. A monitor, usually a Canadian consultant based in Canada, would travel to the field once or twice a year to see that the project was following its approved work plan, a function that CIDA managers, responsible for four or five concurrent projects, could not carry out themselves for lack of time. Some of the monitor's work involved reviewing and commenting on reports prepared by the implementing agency and verifying that the implementing agency was following the CIDA-approved plan for project inputs and activities (CIDA, 1996). Project monitors wielded considerable

power in the early days, and CIDA managers would sometimes suspend projects or force implementing agencies to change their staff, on a monitor's advice.

Prior to the mid-1990s, CIDA often put sector-specific knowledge and skills ahead of performance measurement and evaluation experience when selecting monitors (CIDA, 1996), for example, hiring someone with a background in health to monitor a health project. That the monitor had little monitoring or evaluation experience mattered less than sector experience.

Change came in the mid-1990s after CIDA developed its policy on results-based management,<sup>1</sup> in keeping with the federal government's emphasis on results. RBM became CIDA's main tool for accountability, project management, and learning. After 1996, all Canadian bilateral projects for overseas development assistance had to have a performance measurement framework and a management information system with expected results and indicators. The monitor's role evolved accordingly; monitors had to ensure that the implementing organization put in place an effective internal monitoring system that would allow it to account to CIDA, track progress toward expected results, and make informed decisions (CIDA, 1998). The monitors were still required to provide their own assessments of the project's performance, but their role began to shift from surveillance to facilitation with an emphasis on learning (Morgan, 1999).

This shift, however, is not reflected in official policy. Treasury Board of Canada Secretariat (TBS), the federal agency responsible for evaluation policy, takes a more traditional view of monitoring, as reflected in its *Policy on Active Monitoring* (2001):

Departments are responsible for ensuring that their programs and activities are well managed, and that suitable management practices and controls are in place and working. To this end, they must actively monitor management practices and controls within the department, and take early and effective remedial action in areas where significant deficiencies are encountered or improvements are needed. (Treasury Board of Canada, 2001, p. 1)

At CIDA, some managers now tend to view monitors as team players. They want monitors to help implementing organizations assess their own progress, make the best use of technical advice, learn from experi-

ence, and report within a results-based framework. This new role is consistent with the international trend toward participatory forms of evaluation (Development Gateway, 2002; Kessler, 1998; Patton 1997). It is, for example, not uncommon to have project stakeholders involved in the collection and interpretation of data for monitoring and evaluation (Holte-McKenzie, Forde, & Theobald, 2006; International Fund for Agricultural Development [IFAD], 2006; Nichols, 2002). Proponents of participatory monitoring and evaluation argue that this approach helps to incorporate local knowledge, and builds the analytical capacity of stakeholders to identify their own needs and priorities, make their own choices, and take appropriate action (Holte-McKenzie et al., 2006; IFAD, 2006).

A comparison of the conventional and new role of CIDA monitors appears in Table 1. The new role reflects many of the characteristics

**Table 1**  
**A Comparison of the Roles of CIDA Monitors**

Old role	New role
Acts as an independent, third-party evaluator	Works collaboratively with the project partners, acting as a facilitator, to develop capacity for self-monitoring, accountability, and improvement
Places emphasis on surveillance and control — policing role	Places emphasis on project/program improvement, and encourages the implementing organization to strengthen its systems of self-monitoring for both exogenous and endogenous accountability <sup>7</sup> and improvement
Functions as the eyes and ears of the funding agency	Acts as a team player and facilitator to encourage rigorous self-assessment, reflection, collective learning, and improvement
Reports to the funding agency	Reports to the funding agency, but also informs the implementing organization and its partners
Keeps the implementing organization's involvement to a minimum	Encourages implementing organizations to participate in data collection and analysis
Judges performance	Verifies and validates progress toward results, incorporating multiple perspectives and seeking consensus among the project/program partners
Bases assessments largely on an analysis of work plans versus activity reports and progress in relation to targets	Produces assessments that are multifaceted, incorporating the views of multiple stakeholders
Is often carried out by a Canadian sector specialist	Team approach: monitoring usually undertaken by a Canadian evaluation specialist working in partnership with a locally-engaged consultant, who has evaluation and sector-specific experience

of participatory, collaborative, and utilization-focused approaches to evaluation (Cousins & Earl, 1995; Mathison, 1994; Patton, 1997). The authors next explore some of the important implications in relation to these approaches when applied to monitoring.

### SOME IMPLICATIONS

As Table 1 suggests, monitors need to be good facilitators. However, this role requires a different and, arguably, more sophisticated set of skills (Patton, 1997), among them negotiation, group facilitation, listening, interviewing, and training skills (Nichols, 2002). The authors would add that monitors must have good communication skills and a positive attitude in order to maintain a constructive relationship with project implementing organizations. They must have not only a sound understanding of what constitutes effective development assistance, but also experience in resolving conflict within and among groups, and a high tolerance for ambiguity. Monitors who take a collaborative or participatory approach must be committed to fostering learning. As facilitators they must strengthen the project partners' capacity to gather information, critically assess data, and learn from experience. The collection of useful information is key to effective participatory monitoring and evaluation (Holte-McKenzie et al., 2006; Nichols, 2002). Mebrahtu (2002) suggests that participatory monitors and evaluators must be able to work well as part of a team.

In their conventional "old" role, monitors often focused on judging the effectiveness of technology transfer. Today, as development assistance involves more complex processes such as institutional and organizational capacity development, monitors and evaluators must understand organizational change processes, power relationships, and the formal and informal environmental dynamics that affect capacity (Horton, 2001).

Kessler (1998) suggests that monitors should have technical knowledge and know-how specific to the project's sector. He emphasizes the need for technical, scientific knowledge about environmental management in monitoring projects in this sector. Sector knowledge and experience are particularly important when monitors are required to provide technical advice in relation to capacity development (IFAD, 2006).<sup>2</sup>

In their new role, CIDA's monitors need to have a good grasp of RBM and management information systems if they are to assist the project

staff in establishing systems for information gathering and analysis. They also should have a solid background in monitoring and evaluation, an appreciation of the different approaches, tools, and methods, and knowledge of when and how to apply them. CIDA monitors must also be well-versed in gender equality, since gender equality must be integrated into all CIDA-funded projects and programs.

Although the theory underpinning the role of monitors has shifted, what has happened in practice? In the authors' experience and from their informal discussions with other monitors, monitoring practice at CIDA now falls somewhere between the old and new roles. Much depends on circumstances within and outside the agency. To understand why this is the case, the authors outline some of the challenges monitors face in the ever-shifting environment of international development assistance.

## CHALLENGES FOR CIDA MONITORS

### Lack of Guidelines and Standards

One of the most challenging aspects of a CIDA monitoring assignment is the absence of guidelines and standards for this function.<sup>3</sup> New CIDA project managers receive no training or orientation in relation to the monitor's role, though they are often responsible for hiring and managing external monitors. In the absence of guidelines, the monitor's role can change with each new CIDA project manager, depending on how that manager interprets the monitoring role. Some managers want monitors to focus on verifying results; others want them to help strengthen the implementing organization's own monitoring capacity. Some want a high level of participation and transparency; others want the monitors to distance themselves from the implementing organizations. This situation is exacerbated by high turnover among CIDA project managers (Stiles Associates Inc., 2005).<sup>4</sup> Changing the role with each new manager can be frustrating for the monitor and confusing for the project-implementing organization.

The extent to which external monitors follow a participatory approach also depends on the program or project. Morgan (1999) notes that shared and coherent interests on the part of stakeholders are prerequisites to participatory monitoring and capacity development. Morgan concludes that often the structures and behaviours of programs themselves must change in order to move to more participatory forms of monitoring.

### Overlap with CIDA Manager's Role

Monitors have to guard against duplicating the role of CIDA's project managers. This is challenging because the monitors sometimes have more direct contact with, and more knowledge of, the project than the CIDA manager. Within bilateral programs, CIDA managers typically handle five or more multi-million dollar projects, leaving little time for details. Monitors can easily slip into a management role in which they tell the project-implementing organization what to do — a responsibility that falls clearly under the purview of the CIDA manager. Ideally, the monitor should facilitate a process wherein the implementing organization reflects on its progress, drawing on the monitor's perspective and its own information, in order to make informed decisions for project improvement. It is more difficult and time-consuming to perform this role than to simply tell the implementing organization what to do. The monitor must resist the temptation to shape the project (Rowe, Jacobs, & Grant, 1999).

There is risk of duplication when monitoring involves large programs that consist of many projects. In this situation, the funding agency sometimes asks its monitors to develop an overall performance framework and to assess progress against that framework. The primary purpose of this function is to assist the funding agency in developing and tracking its country-level program. At CIDA, this work is largely the responsibility of the agency's country policy analyst and the country program director. The lines between the responsibilities of the monitor and these CIDA officers are often blurred.

Another difficulty is that monitors often inherit a performance measurement framework, to which they have had no input. As Patton (1997) points out, these frameworks are often designed more for accountability than program improvement. Where this is the case, the implementing organization may resent the monitor suggesting any changes to the framework. In the authors' experience, many implementing organizations are hesitant to change their performance measurement framework once they have their data-gathering systems in place for reporting to donors. Engaging the monitor early in the project cycle provides an opportunity for the monitor to help design the framework so that it is geared equally to accountability and program improvement and adjusted from year to year as the project environment changes.

### Monitoring Gender Equality

Monitoring the implementation of CIDA's *Policy on Gender Equality* (CIDA, 1999) poses many challenges and underscores the need to be clear about the monitor's role. The policy has the following three objectives:

- to advance women's equal participation with men as decision-makers in shaping the sustainable development of their societies;
- to support women and girls in their realization of their full human rights; and
- to reduce gender inequalities in access to and control over the resources and benefits of development. (CIDA, 1999, p. 7)

Although CIDA has identified gender equality as a key factor of success (CIDA 2005a), the majority of CIDA projects struggle with it and are only marginally successful at integrating gender equality (CIDA, 2005b; CIDA, 2003; McCann, 1998).

The urban environmental management (UEM) project that the authors are co-monitoring is no exception. It features gender awareness training, research on the gender dimensions of UEM, and women's participation in UEM demonstration projects. But the project has achieved relatively little toward advancing women's equal participation in decision-making and reducing gender inequities in access to and control over the resources and benefits of UEM.

Ingrained attitudes toward women are a second major challenge. On a recent monitoring mission, the authors found gender insensitivity to be pervasive. The failure of managers to appreciate the importance of gender dimensions in UEM is reflected in the following statements:

- "Why is CIDA so concerned about gender equality when these are essentially technical projects?" (Demonstration project manager)
- "Men and women are equal in our country — why the fuss about gender equality?" (Demonstration project manager)
- "The gender equality coordinator is responsible for the gender component." (Member of the project management team)<sup>5</sup>

Mbozi (2001) notes that monitoring gender equality involves considerable qualitative assessment. This poses challenges for the monitors,

as implementing and funding agencies tend to emphasize quantitative indicators. Data on qualitative indicators are often more difficult to obtain and interpret. The task is even harder where there are no benchmarks or baselines (ESCAP, 2005). The absence of baseline data on gender issues impedes the prediction of outcomes and the selection of corrective interventions, and makes performance measurement difficult for implementing organizations and monitors alike.

By way of example, the UEM project conducted gender situation analyses in 12 target cities in the region. The analysis turned up relatively little information on the gender dimension of UEM. The research showed that few women's organizations work in this field and few organizations had explored this aspect of UEM.

The wide range of cultures and customs in the project region adds to the complexity of the monitors' role with respect to gender. In some countries, women tend not to speak out at formal meetings, but strongly influence decision-making in households. In one country, the leader of a women's group will meet with the monitors to describe her group's work on solid waste management, but she is unlikely to have much say in community decision-making. In another country, women's groups do take a lead role in decision-making at the community level. These variances make monitoring complex. While the monitors must not compromise the principles of gender equality, they must be respectful of local traditions and mindful of projects imposing western values.

Project-implementing organizations have few practical tools to guide them in integrating gender equality and may not get the support they need from CIDA managers (CIDA, 2005b; CIDA, 2003). The monitor's most practical approach may be to help the implementing organizations develop gender-specific results statements and gender-sensitive indicators, and devise systems to gather and analyze gender-related data. However, they are often not hired in time to provide such assistance. Monitors must consider conflict of interest when asked to assist in developing gender strategies, especially in cases where the implementing organization has its own gender specialists.

#### Technical Assistance

CIDA generally prefers that monitors have technical expertise related to the project's development sector. However, exercising this technical expertise can lead monitors into troubled waters, as illustrated

in Figure 1. If not vigilant, a monitor may soon be advising the implementing organization on technical matters, particularly if he or she spots flaws in the project design or implementation. The danger here is that monitors may end up monitoring project interventions that they themselves have recommended, thus creating a conflict of interest.

As well, the provision of technical advice to the implementing organization can create dependency. In such cases, the funding agency may justifiably take the implementing agency and monitors to task, having contracted the implementing organization with the expectation that it possessed the required technical know-how to run the project.

As illustrated in Figure 1, monitors can provide technical advice to the funding agency without conflict of interest. For example, they can comment on the technical quality of the implementing organization's annual work plan, and on its management capacity and financial administration. Or the funding agency may call upon its monitors to conduct short-term training, perhaps in gender equality or results-based management, for the implementing organization's staff. Monitors can advise an implementing organization on how to design its systems for information gathering, analysis, and reporting without conflict of interest as suggested in Figure 1. Under the "new" role for monitors (Table 1), this ought to be one of their primary responsibilities.

**Figure 1**  
**Potential for Conflict of Interest When Monitors Provide Technical Advice**

	Advice to CIDA	Advice to the implementing organization
Pertaining to areas of <b>content</b> (e.g., environmental management, community mobilization)	No conflict	Potential conflict of interest
Pertaining to <b>performance measurement</b>	No conflict of interest	No conflict of interest

Figure 1 illustrates the potential for conflict of interest that occurs when monitors provide technical advice to the implementing organization in areas pertaining to programming content, a sphere that clearly falls under the authority of the CIDA manager. In such cases, the implementing organization is likely to become defensive and may question the CIDA manager about the monitors' role.

### Overlap Between Monitoring and Evaluation

The lines between monitoring and evaluation functions are not always clear (IFAD, 2006). Monitoring is concerned mainly with performance measurement, that is, providing an ongoing reading of how well a project or program is performing in relation to a work plan, budget, and/or logical framework. In the new role, it is also about improving a project's self-monitoring processes and capabilities. Monitors can work with the implementing organizations and their partners to help them strengthen their internal monitoring system so that they are better equipped to gather data regularly, reflect on those data, and make the changes needed to improve performance and achieve results. This role can also help improve accountability to the funding agency.<sup>6</sup>

Evaluation is usually seen as distinct from monitoring. Evaluation can dig deeper than monitoring; it can deal with issues, investigate a project's long-term results, and identify successes, shortcomings, and lessons. It can also help to inform future programming with in-depth analysis of issues related to the program's future.

Problems may arise when CIDA asks its monitors to delve into issues and provide advice as evaluators would do. This can undermine a monitor's relationship of trust with the implementing organization. It may, as well, run counter to the participatory nature of monitoring as described in the right-hand column of Table 1. When monitors are asked by the funding agency to dig into specific issues or to inform the agency regarding something other than performance — where to focus the project or what the ideal staffing make-up should be, for example — that becomes a form of technical advice and must be thought through carefully. Is there a potential conflict of interest? Should the monitors and/or the funding agency disclose that information to the project implementing organization? These are difficult decisions and, depending how they are handled, they have the potential to put the monitors in a tight spot.

## Communication

Effective communication is critical to the success of monitoring, but difficult to achieve when the monitors' role is unclear and the lines of authority blurred. CIDA monitors are accountable to CIDA; their first line of communication is to the project manager at CIDA's headquarters in Canada. However, CIDA representatives and locally engaged advisors in the field may want information about the project's performance as soon as, if not before, the project manager at headquarters. They may have a different view of the monitors' role and may try to influence the monitors' assessments. From the authors' experience, both CIDA representatives and the implementing organization's field staff often have difficulty accepting monitors in a facilitation role: they would prefer that the monitors advise on how to fix performance problems, rather than facilitate a process that would aid them in finding their own solutions. Personalities, personal preferences, and organizational politics make the communication process even more complex, requiring a high degree of sensitivity on the part of the monitors.

The authors have found it useful to clarify their role with all stakeholders at the outset of an assignment, beginning with CIDA's project manager. An exchange of letters may be prudent if the monitors' terms of reference are vague. Monitors need to deal squarely with such issues as conflict of interest, role overlap with project managers and advisors, provision of technical assistance, and the balance between results validation for accountability and strengthening internal monitoring systems for self-assessment and program improvement. Role clarification at the outset may take considerable time, but it is worth the effort, given the problems that may occur down the road when roles are unclear.

The authors have also found it helpful to frequently discuss their role with the project participants and the implementing organization. Many overseas partners have preconceived ideas of what monitors do and do not do, ideas that are often associated with third-party, non-participatory evaluation in the old role mode (Table 1). If the monitor's role is unclear, it needs to be negotiated until a consensus is reached.

At times, the greatest challenge is communicating with the implementing organization, particularly when its performance is found lacking. Do the monitors maintain a distance? If so, how much dis-

tance? Do the monitors disclose to the implementing organization everything that they report to the funding agency? Does the project-implementing organization get copies of the monitors' reports, and if so, through what process? How are sensitive issues, such as financial mismanagement and disputes among project personnel, to be handled? To what extent does the monitor communicate with the implementing organization's local partners, who are often government officials and/or non-government organizations and institutions?

Monitors must be skilled in intercultural communication because most of the implementing organization's staff and the project participants are foreign nationals. Monitors must also be acutely sensitive to the gender dimensions of communication within the project's cultural context.

All these factors test the monitors' judgement and skills as communicators and underscore the need for clarity regarding their role.

#### THE NEED FOR RESEARCH AND GUIDELINES

It is somewhat surprising how little research has been conducted on the monitoring function even though agencies such as CIDA have hired external monitors for decades. What value do monitors contribute to development assistance, and what lessons have they learned about their work? It would be useful to the agency and the evaluation community as a whole to document answers to these questions.

The monitor's role at CIDA would be clearer if there were policy guidelines that dealt with many of the issues the authors have raised. Guidelines have the potential to bring some consistency to the role and would be helpful not only to CIDA project officers and monitors but also to CIDA's partners in the field. Any guidelines should, however, be flexible, so that the monitor's role can be adjusted as circumstances change in the field, and as research brings new information about what works well and when.

#### CONCLUSIONS

Consistent with international trends in evaluation, monitoring has, at least in theory, evolved over the past decade to become more participatory and transparent in ways that facilitate learning and program improvement. However, the external monitor's role is neither

well understood nor consistently supported by the funding agencies that employ them. Monitors are often hampered in performing their role by lack of clear guidelines, standards, and procedures. Some managers continue to value a surveillance role for monitors, placing accountability ahead of program improvement and learning. Canadian federal policy in relation to monitoring has not been updated since 2001.

Participatory monitoring aimed at enhancing performance and learning presents many challenges for monitors. Among them is the potential to overlap with the funding agency's managerial function. Conflict of interest may occur when monitors are required to provide technical assistance. Intercultural communication and monitoring the gender dimensions of development programs are particularly demanding.

External monitors can be invaluable to funding agencies and to implementing organizations in the field of development assistance. They can be important sources of information and expertise. As facilitators of reflective processes, they can help stimulate program improvement.

This article has made a case for a participatory approach to monitoring aimed at learning and program improvement. It has noted the complexity and some of the challenges inherent in this approach, not the least of which is that it is not well understood by development agencies. The authors call upon the evaluation community to undertake research and scholarly discourse in this area to guide successful practice, without which monitors will continue to navigate through uncharted waters at their peril.

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#### NOTES

1. CIDA defines a result as a measurable change resulting from a cause-and-effect relationship, and RBM as a management philosophy and approach that involves defining realistic expected results, identifying program beneficiaries, monitoring progress toward results, identifying

and managing risks, increasing knowledge by learning lessons, and reporting on results achieved and resource involved (CIDA, 2000).

2. The authors agree that sector experience is helpful, but would argue that broad-based development experience and knowledge of local languages and customs are equally, if not more, important.
3. At the time of writing, CIDA's Performance and Knowledge Management Branch is preparing a document on monitoring.
4. One of the authors has seen seven different CIDA managers on a single project over an eight-year period.
5. The quotes are from field notes gathered during monitoring missions of the CIDA-funded UEM project in 2005.
6. Regrettably, many implementing organizations go about their data collection in a perfunctory manner. Their primary aim is "to fill in the boxes for CIDA," as some would admit in reference to reporting on results.
7. Exogenous accountability refers to a project's accountability to external stakeholders — foreign government donors, for example. Endogenous accountability refers to a project's accountability to local stakeholders, such as the project participants, NGOs, and government partners.

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