

TOOLKIT

FOR IDENTIFYING, MONITORING AND EVALUATING
THE VALUE ADDED OF TRIANGULAR CO-OPERATION

A LIVING DOCUMENT THAT BENEFITS FROM FEEDBACK AND WILL BE REVISED REGULARLY



Contents

ACKNOWLEDGEMENTS	5
INTRODUCTION	6
How to use this toolkit?	6
TOOL 1: IDENTIFYING THE VALUE ADDED OF TRIANGULAR CO-OPERATION	8
1) Building ownership and trust.....	9
2) Promoting complementarity and increasing co-ordination in development co-operation	9
3) Sharing knowledge and learning jointly.....	9
4) Co-creating solutions and flexibility	9
5) Enhancing volume, scope and sustainability	9
6) Achieving global and regional development goals through strengthened partnerships for sustainable development.....	10
TOOL 2: FORMULATING INDICATORS TO TAKE ACCOUNT OF THE VALUE ADDED OF TRIANGULAR CO-OPERATION.....	11
Steps in planning a triangular partnership.....	11
Results framework to take account of partnership results	12
Indicators to account of the value added of triangular co-operation	15
1) Building ownership and trust.....	16
2) Promoting complementarity and increasing co-ordination in development co-operation	17
3) Sharing knowledge and learning jointly.....	18
4) Co-creating solutions and flexibility	19
5) Enhancing the volume, scope and sustainability of triangular co-operation	20
6) Achieving global and regional development goals through strengthened partnerships for sustainable development.....	21
TOOL 3: DESIGNING EVALUATIONS TO TAKE ACCOUNT OF THE VALUE ADDED OF TRIANGULAR CO-OPERATION.....	22
Defining the scope of the evaluation and choosing evaluation criteria	22
1) How to evaluate building ownership and trust?	25
2) How to evaluate promoting complementarity and increasing co-ordination in development co-operation?.....	25
3) How to evaluate sharing knowledge and learning jointly?	26
4) How to evaluate co-creating solutions and flexibility?.....	26
5) How to evaluate enhancing volume, scope and sustainability?.....	27
6) How to evaluate achieving global and regional development goals through strengthened partnerships for sustainable development?	27

BIBLIOGRAPHY..... 28
GLOSSARY OF KEY TERMS..... 29

ACKNOWLEDGEMENTS

The idea for this toolkit was born out of the experiences that many practitioners face in having to justify working in a triangular co-operation arrangement rather than through bilateral or regional co-operation activities. Participants at an international meeting on triangular co-operation in Lisbon in 2016 stressed that while practitioners commonly discuss the value added of triangular co-operation, it is rarely captured in analyses and assessments, such as evaluations.

The OECD offered to follow up on this issue by drafting a toolkit together with other interested partners. The toolkit is a work in progress led by Nadine Piefer with Juan Casado-Asensio, and with inputs from Michael Laird, Rosie Zwart, Joëlline Bénéfice, Chantal Verger, Susanna Morisson-Métois, Valentina Orru, Karen Jorgensen and Ana Fernandes of the OECD's Development Co-operation Directorate. A group of interested experts contributed further inputs, comments and ideas: Ulrich Müller, Natalie Bartelt and Audrey Gramcko (Germany/Gesellschaft für Internationale Zusammenarbeit, GIZ), Juliana Dei Svaldi Rossetto and Lars Thomann (Food and Agriculture Organisation, FAO), Fabiola Soto and Tadeo Bérjon Molinares, together with numerous colleagues from the Mexican Agency for International Development Co-operation (AMEXCID), Ana Ciuti and Marina Mantecón Fumado (Ministry of Foreign Affairs and Worship, Argentina), Riad Ragueb and Adelhakim Yessouf (Islamic Development Bank), Suguru Minoya (Japan International Cooperation Agency, JICA), Paulo Esteves (BRICS Policy Center, Rio de Janeiro), Carmen Sorger and Allisson Zaldivar (Global Affairs Canada), Rita Walraf (German Federal Ministry for Economic Co-operation and Development, BMZ), Gcino Mlaba (Department of Science and Technology, South Africa), Sachin Chaturvedi (Research and Information System for Developing Countries, RIS, India), and Dennis Busemann, Lutz Meyer and Kristina Wirtgen (German Institute for Development Evaluation, DEval). Special thanks to Stephanie Coïc (OECD) for the layout and design of the toolkit.



The toolkit benefitted greatly from discussions, comments and ideas during the “IV Regional Conference on Triangular Co-operation in Latin America and the Caribbean” in Lima, Peru (26-27 September 2017) and during the International Seminar on Trilateral Co-operation – Experiences and Challenges” in Brasilia (6-8 November 2017).

The fourth international meeting on triangular co-operation on 17-18 April 2018 was co-organised by the F.O.R. Unit of the OECD's Development Co-operation Directorate and the Camões – Instituto da Cooperação e da Língua, I.P. (Portugal). Over 100 representatives from national governments, international organisations, municipalities, the private sector, civil society, academia, trade unions and private philanthropy participated in the meeting and provided valuable feedback for the toolkit. Based on these inputs, the toolkit was updated and is available online (<http://www.oecd.org/dac/dac-global-relations/triangular-cooperation.htm>) so that practitioners are able to pilot its different tools when planning or evaluating triangular co-operation projects. The toolkit is a living document that will be continuously revised and updated, based on feedback from the field.

INTRODUCTION

The strong emphasis of the Sustainable Development Goals (SDGs) on partnerships – with Goal 17 dedicated to global partnerships – calls for greater consideration of how and when partnerships are most effective in delivering a development impact. Besides its developmental and strategic objectives, establishing a partnership is at the heart of triangular co-operation, which is why this modality is relevant for achieving the SDGs.

This toolkit offers ideas for policy makers, practitioners and evaluators to capture the value added of triangular co-operation, from day one of the project idea. Many countries and institutions choose to work trilaterally¹ because they want to make use of the comparative advantages of the different partners involved, strengthen partnerships or scale-up proven solutions to development challenges (see Tool 1 for a more comprehensive list of the value added of triangular co-operation). However, often, the partners involved do not incorporate this additional and significant value into the project design. As a result, projects are designed, monitored and evaluated from the perspective of development results and do not take into account the value or the importance of the partnership created, nor how synergies between the two have been created, if at all.

To ensure that the twin objectives of partnership and development results are considered fully, this toolkit provides inputs and food for thought on:

- **Identifying the value added of triangular co-operation (Tool 1):** A checklist of six different areas where triangular co-operation may typically add value from a partnership perspective.
- **Formulating indicators to account for the value added of triangular co-operation (Tool 2):** The value that triangular co-operation adds to the partners involved can be measured and monitored in the same way as in other development co-operation projects: by formulating objectives, creating indicators and measuring results. This calls for results frameworks that also account for partnership-specific results, besides the intended development results. Tool 2 provides guidance for developing such results chains and indicators.
- **Designing evaluations to take account of the value added of triangular co-operation (Tool 3):** Tool 3 provides ideas for designing an evaluation that combines the DAC criteria for evaluation² and South-South co-operation principles into evaluation matrices that can support gathering evidence on the value added of triangular co-operation.

How to use this toolkit?

A text box at the beginning of each tool explains how to use each of the three tools. The three tools of this toolkit are linked (see Figure 1), but the toolkit should not be seen as a “how-to-guide” of triangular co-operation. Every triangular co-operation project will follow its own theory of change to achieve a given development result, and ideally, will develop a monitoring framework to keep track of progress. Having these two elements in place constitute the starting point for using the toolkit.

When planning a new triangular co-operation initiative, the areas where triangular co-operation might add most value in a given co-operation context can be identified in Tool 1. Then, based on ideas in Tool 2, the user of this toolkit may like to consider including two or three additional indicators in the project design and the monitoring framework to keep track of progress with achieving the partnership

¹ The terms ‘triangular’ and ‘trilateral’ co-operation will be used interchangeably for the purpose of this toolkit.

² The DAC criteria for evaluation are currently under discussion and might be revised. If such decisions are taken in the OECD DAC Network on Development Evaluation (EvalNet), this toolkit will be updated accordingly.

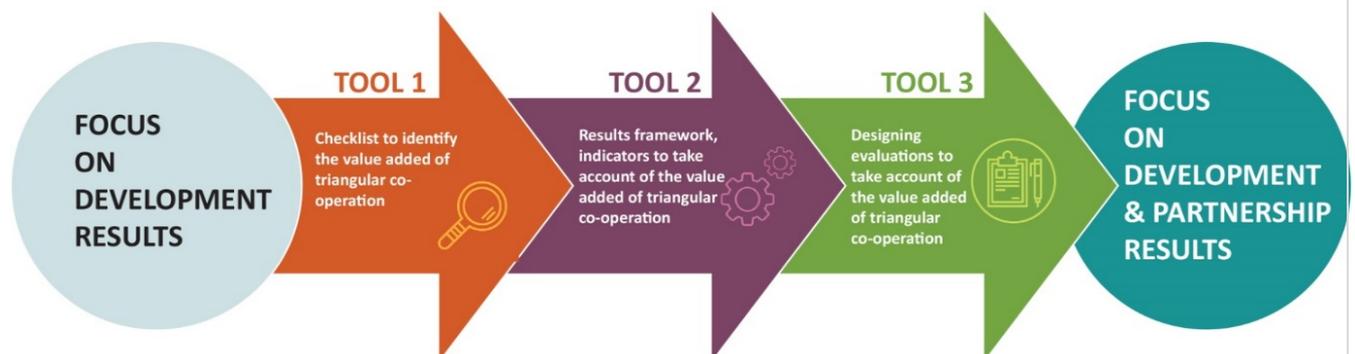
results in the overall theory of change. These indicators can be changed and adapted to fit the project context.

For evaluations, there are two possible starting points for using this toolkit. First, the toolkit can be used for projects that were designed using some of the suggested indicators in Tool 2. Based on the monitoring data and other project documents, evaluations can then assess the value added of triangular co-operation. The second case is for projects that were planned without including specific indicators to take account of the value added of triangular co-operation. In this case, the indicators in Tool 2 could be seen as proxies for the evaluation design.

The toolkit helps assess the value “added” and not so much the value “negative” of triangular co-operation. Bearing in mind the pitfalls of triangular co-operation, such as possibly higher transaction costs at the beginning of projects, it should be equally important to assess where and how triangular co-operation might have a negative value. The user of this toolkit should assess triangular co-operation with a critical eye.

Summing up, the toolkit provides inputs and inspiration for triangular co-operation, but it is not meant to be followed mechanically or in total. Any indicator or question can and should be adapted to suit the specific project context. In other words, users should not apply all indicators and questions included in this toolkit when designing, monitoring or evaluating triangular co-operation projects.

Figure 1: Overview of the Toolkit



TOOL 1: IDENTIFYING THE VALUE ADDED OF TRIANGULAR CO-OPERATION

How to use Tool 1?

When planning a project or an evaluation, Tool 1 can help identify the areas where triangular co-operation may add value. For new projects, these areas can be taken up in the project design and its monitoring framework. In the case of evaluations of triangular co-operation, this tool may provide inspiration for additional areas to cover when devising the evaluation framework. Practitioners may want to pick and choose the areas that are most relevant for their specific project.

Tool 1 provides an overview of how triangular co-operation typically adds value. Before being able to plan and account for this value added, it is necessary to know what exactly triangular co-operation is. There is no internationally agreed definition of this modality, but the meetings on triangular co-operation that the OECD's Development Co-operation Directorate organised in Lisbon (in 2012, 2013, 2016, and 2018), hosted by the Government of Portugal, paved the way for a deeper understanding and developed a working description of triangular co-operation. The members of the Global Partnership Initiative (GPI) on effective triangular co-operation are building upon the conclusions from these dialogues in their work, concluding that triangular co-operation is a modality in its own right that can be characterised for having at least three partners, each of them having a particular role:



- The **facilitator partner** helps to connect countries and organisations to form a triangular partnership and gives financial and/or technical support to the collaboration.
- The **pivotal partner** often has proven experience and shares its resources, knowledge and expertise through triangular co-operation.
- The **beneficiary partner** is the target of the development results to be achieved through the triangular co-operation project and in line with its national development priorities and needs. It is responsible for ensuring that results are sustainable.

Each partner can have more than role and partners can take on various aspects of all roles throughout the lifetime of the horizontal collaboration or can play different roles in related activities or partnerships. The range of possible partners is wide and includes, among others, representatives of governments, international organisations, civil society, private philanthropy, academia, local governments, cities, regional organisations, trade unions, and the private sector. Different partners may need to adapt the tools slightly to use them in their specific context and according to their needs.

Based on this understanding, and drawing on the results of the survey that the OECD conducted in 2015 as well as discussions at the international meetings in Lisbon in 2016 and 2018, and various consultations with key partners in triangular co-operation, six specific ways in which triangular partnerships typically add value and contribute to increasing the effectiveness of international development initiatives can be identified. These are: 1) building ownership and trust, 2) promoting



complementarity and increasing co-ordination in development co-operation, 3) sharing knowledge and learning jointly, 4) co-creating solutions and flexibility, 5) enhancing the volume, scope and sustainability, and 6) achieving global and regional development goals through strengthened partnerships for sustainable development.

1) Building ownership and trust

Triangular co-operation can ...

- a) Increase ownership of all partners involved
- b) Build a level of comfort that leads to/ contributes to build trust among the partners involved
- c) Establish partnerships that go beyond development co-operation and that facilitate exchanges in other areas (e.g. foreign policy, trade, environment)

2) Promoting complementarity and increasing co-ordination in development co-operation

Triangular co-operation can...

- a) Make good use of complementary strengths, such as specific expertise or access to technology, to achieve development results
- b) Promote greater co-ordination, complementarity and coherence (the 3Cs) across development co-operation mechanisms (North-South, South-South, regional and international co-operation)

3) Sharing knowledge and learning jointly

Through triangular co-operation, all partners involved can ...

- a) Share knowledge and practical solutions that take advantage of the similarities in national contexts and of the best that South-South and North-South co-operation has to offer
- b) Expand perspectives on different approaches and principles to development co-operation
- c) Ensure long-term commitment for capacity development, including for the roles and capabilities of pivotal partners
- d) Ensure long-term commitment for the partnership.
- e) Provide flexibility and adapt to changing circumstances

4) Co-creating solutions and flexibility

Triangular co-operation can...

- a) Find innovate and cost-effective, flexible, context-specific solutions to development challenges
- b) Bring together expertise and specific knowledge to overcome development challenges in difficult contexts, such as fragile contexts, e.g. by involving experts from neighbouring countries or countries perceived as 'neutral brokers'
- c) Bring together partners in development that would have not necessarily met, leading to new combined solutions and reducing fragmentation

5) Enhancing volume, scope and sustainability

Triangular co-operation can...

- a) Mobilise partners, in-kind resources and funding, increasing the volume and scope of development co-operation projects (e.g. by building bridges with countries where one of the partners has no diplomatic representation, making use of multilateral agencies' country offices, networks and platforms among Southern and other partners)



- b) Encourage sharing of successful experiences as a result of bilateral co-operation and provide an entry point for scaling-up these projects
- c) Integrate readily into larger development co-operation programmes, where a component of the programme may be implemented trilaterally

6) Achieving global and regional development goals through strengthened partnerships for sustainable development

Triangular co-operation can...

- a) Contribute to improving the effectiveness of development activities by making use of the combined knowledge, technology, experience and funding of different partners
- b) Encourage different types of stakeholders to participate and effectively engage in development co-operation, including the private sector, academia, civil society, private philanthropy, parliaments, regional and local governments
- c) Contribute to developing a shared understanding of development policy and discussing instruments, tools and criteria
- d) Contribute to promoting and disseminating local good practices, also at the global level
- e) Have a key role in enabling the effective achievement of the Sustainable Development Goals through inclusive multi-stakeholder approaches to co-operation

Many of the expected benefits of triangular co-operation can be measured by using well-established techniques, i.e. by formulating objectives, creating measurable indicators and measuring results, using both quantitative and qualitative methods. Partners involved in triangular co-operation could pilot the use of the areas identified in this tool and continue developing and refining them. Based on this tool, a second tool suggests a results chain that illustrates the relation between development and partnership results as well some indicators to take account of the value added of triangular partnerships.



TOOL 2: FORMULATING INDICATORS TO TAKE ACCOUNT OF THE VALUE ADDED OF TRIANGULAR CO-OPERATION

How to use Tool 2?

Tool 2 provides inspiration for possible indicators that may help with capturing and measuring the value added of triangular co-operation. It suggests a results chain that illustrates how development, strategic and partnership outcomes are linked. Based on this logic of intervention, when designing triangular co-operation projects the user may wish to include 2-3 additional indicators in the overall results framework of the triangular co-operation project.

Likewise, when planning an evaluation, 2-3 indicators may be used as proxies to assess the extent to which a triangular co-operation project has added value.

In triangular co-operation projects, development and partnership objectives are both relevant and, typically, mutually reinforcing, with the partnerships created potentially lasting longer than the project itself and leading to the development of new triangular activities with the same partners. While a clear focus on development results is crucial, this should not eclipse the other benefits produced by triangular arrangements in terms of creating sustainable partnerships for development, as emphasised in the Sustainable Development Goal 17 (especially targets 17.6 and 17.9). Figure 3 illustrates how development and partnership results may be interlinked, bearing in mind that this illustration gives a more linear impression than how activities, processes, outputs and outcomes actually happen in reality.



Steps in planning a triangular partnership

There are numerous ways of initiating a triangular co-operation, e.g. starting with discussions and co-operation among:

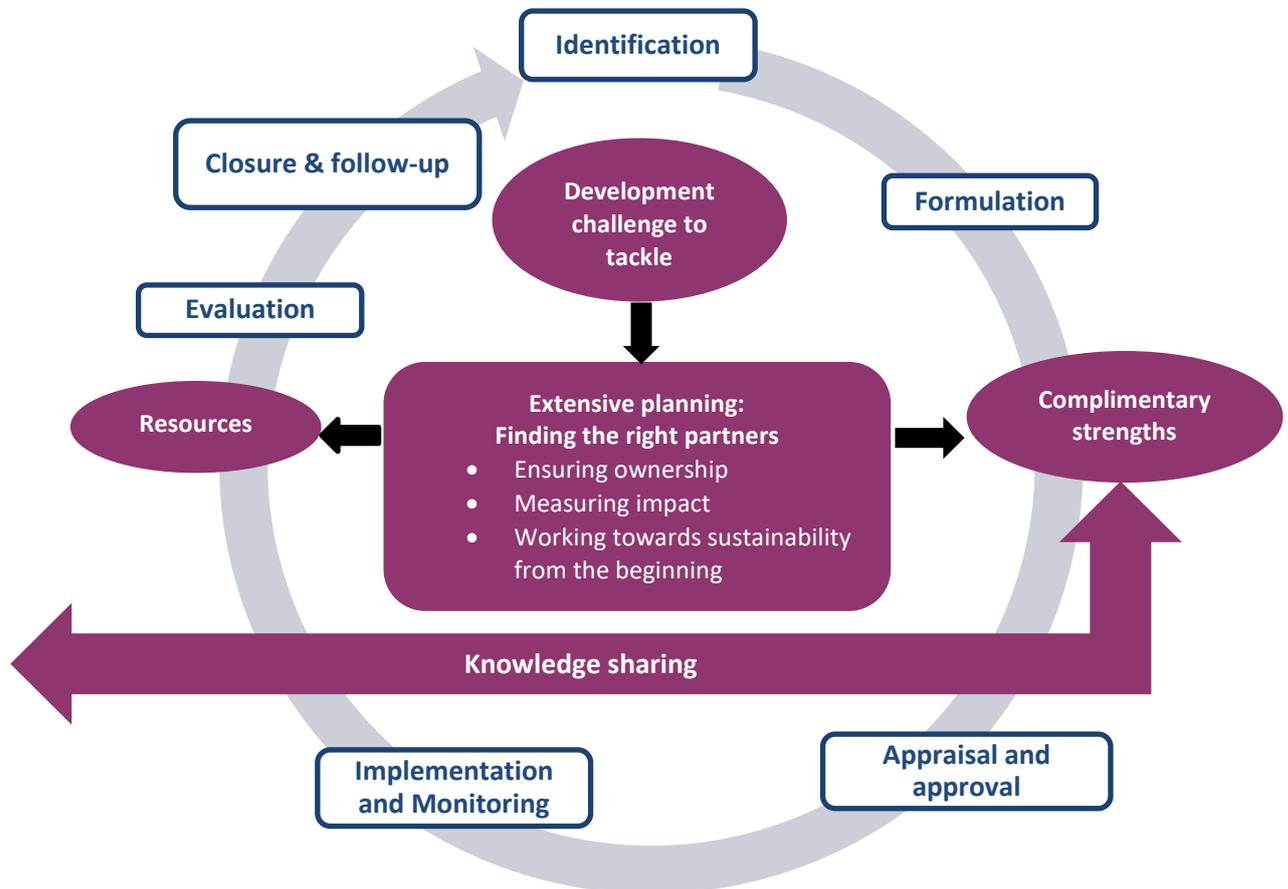
- a) the beneficiary and pivotal partner
- b) the pivotal and facilitating partner
- c) the facilitating and beneficiary partner

Another option is that there is a development challenge in the beneficiary country that needs to be tackled and the country looks for the right partners with complementary strengths and expertise. Partnership development in triangular co-operation deserves special attention and sufficient time, as it lays the ground to create strong and dynamic ownership among all partners. The process can be illustrated along the spirit of complicity in a sports team: Team members come together for a certain amount of time, build strong trust, negotiate how resources are best used, then they work together towards a common objective for some time, may interrupt the co-operation when each partner takes over responsibility for a certain project component, come back together again, and finally, jointly achieve the desired outcome.



Ideally, partners agree at the beginning how to measure the impact of their activities and to ensure sustainability. Knowledge sharing is a cross-cutting process throughout the life of the triangular co-operation which strengthens the partnership and leads to enhanced development results.

Figure 2: Example of a possible process of creating a triangular partnership



Results framework to take account of partnership results

Triangular co-operation projects need results frameworks that include activities, processes, outputs and outcomes, with their related indicators, to measure both the intended development results and other intended benefits generated by the partnership. These partnership results may include, but are not limited to, those areas that were identified in Tool 1, namely: 1) building ownership and trust; 2) promoting complementarity and increasing co-ordination in development co-operation; 3) sharing knowledge and learning jointly; 4) co-creating solutions and flexibility; 5) enhancing volume, scope and sustainability; and 6) achieving global and regional development through strengthened partnerships for sustainable development.

Achieving development results is related to the quality of the partnership, which in turn is influenced by various processes. These include, how the project is initiated, how it is structured, managed and resourced how the partners relate to each other. For instance, systematic exchange among the partners builds trust and leads to a strengthened partnership. A fine balance needs to be found between convergence among the partners and delegating tasks, i.e. trusting each other to independently carry out part of the project activities and to avoid over burdening the project or to

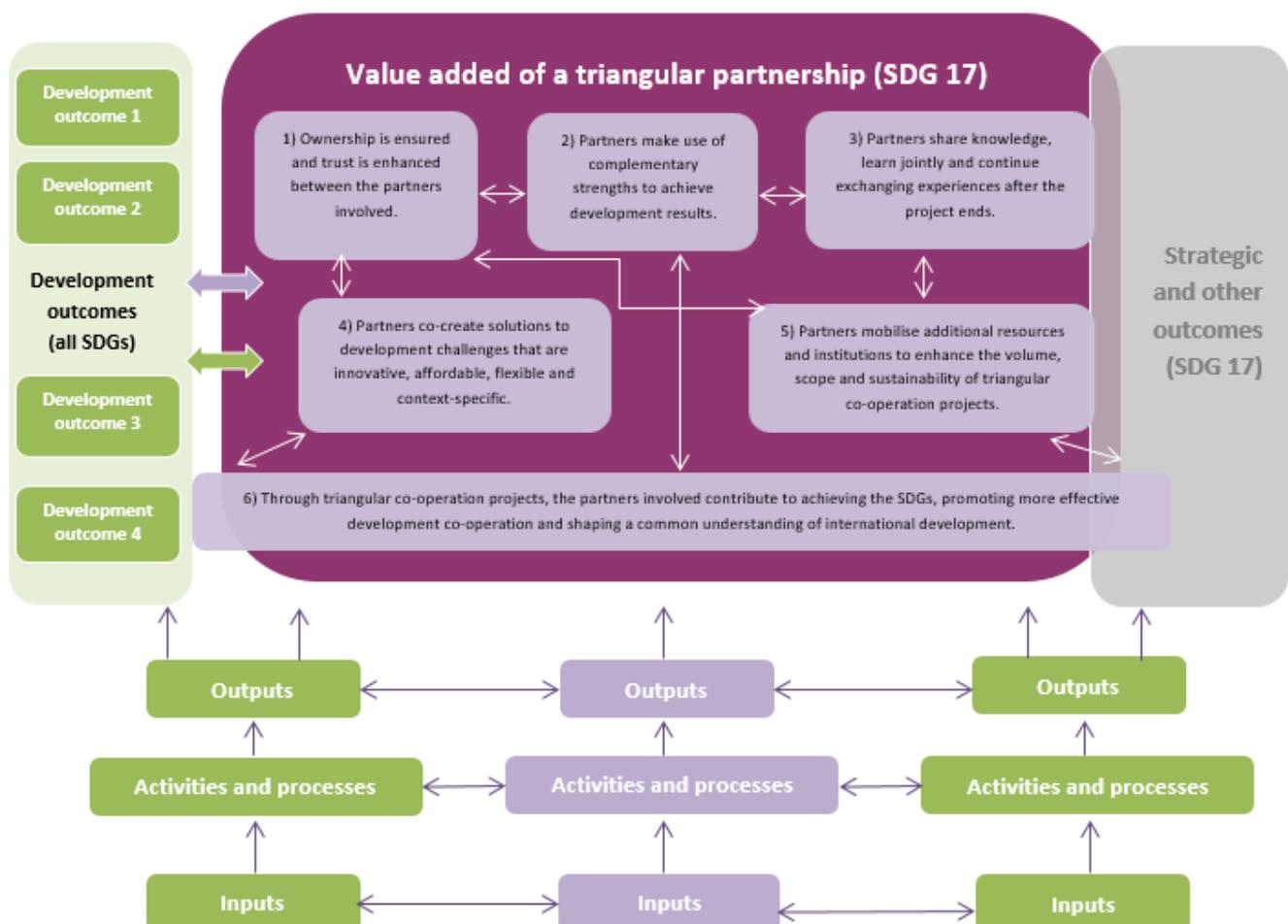


avoid implementing the various components of the project in parallel, fragmented pieces. These processes can be formal or informal and not all processes need to be always carried out jointly among all partners:

- **Formal processes include:** Governance structures and decision-making processes such as steering groups to oversee the project; regular meetings; monitoring systems and instruments; feedback loops, resource allocation and distribution of costs; information flows and communication channels.
- **Informal processes include:** Relationships between individuals, communities and the institutions they represent at all levels of collaboration.

To capture the value added of triangular co-operation, the whole results chain, including formal and informal processes, should be analysed, bearing in mind different theories of change and that results are not linear, but interlinked. Development outcomes in triangular co-operation may contribute to achieving any of the Sustainable Development Goals (SDGs), depending on the specific focus of the project, however, the strategic outcomes and the value added of a triangular partnership, typically contribute to achieving SDG 17 (see Figure 3).

Figure 3: Results chain of development and partnership outcomes in triangular co-operation projects



The matrix in Table 1 links key principles of triangular co-operation³ with the different processes in a triangular initiative. Ownership can be considered both as an overarching and cross-cutting principle as well as a dynamic process.

Table 1: Matrix of key principles and processes in triangular co-operation

Processes → Principles ↓	Ownership of all partners	Monitoring transaction costs	Aligning to national development strategies
Horizontality and trust	Additional time needed to build a horizontal and trusting partnership where ownership of all partners is ensured	Higher transaction costs in the beginning to ensure everyone's participation in designing the project. This phase is important to establish clear procedures and develop a win-win-win partnership.	During the negotiation and planning phase, the beneficiary partner is in a position to clearly voice its demands from the other partners to tailor the initiative to its development needs
Mutual responsibility and knowledge sharing	Feedback loops and processes of joint learning ensure that all partners maintain ownership of the project	Clear definition of roles, resources and contributions based on using complementary strengths of each partner keep transaction costs stable and predictable throughout the implementation	All partners benefit, but the beneficiary partner ensures that the triangular activities are aligned to its national development strategies and linked to other development programmes in the country, region or municipality
Accountability	Monitoring and information systems provide updates about the project's progress – all partners can intervene and adapt the activities if they fear that the objectives might not be achieved	Through the open and trustful interaction among the partners, transaction costs may decrease towards the end of a project and they will most likely be lower in the next project phase or when the same partners decide to engage in further triangular initiatives	Ensuring sustainability and planning follow-up scenarios from the beginning of the project is important to align it fully with national development strategies of the beneficiary partners

A working hypothesis for many practitioners who implement triangular co-operation projects is, that over the life of a project, the different processes will influence the value added of triangular co-operation. As mentioned earlier, all partners are likely to invest more resources at the beginning of a project, especially time, to discuss and agree on a common project approach. Higher transaction costs may arise during this period, but this time is well invested, as the discussion and negotiation process is necessary to build trust. It ensures that every partner exerts ownership. At the same time, beneficiary partners can lower their transaction costs by co-ordinating different providers of development solutions in a triangular initiative, rather than engaging with each one individually. The processes among partners create trust and a strong relationship that has potential to deliver good development results. These stable and horizontal partnerships could then be scaled-up, once the initial project ends.

³ Principles adapted from the *Management Guidelines for implementing Triangular Cooperation in Ibero-America* that were created by the Ibero-American Programme for the Strengthening of South-South Cooperation (PIFCSS) in 2015 and based on discussions at the international meeting on triangular co-operation in Lisbon in 2018



Indicators to account of the value added of triangular co-operation

In this section, indicators to measure the six possible partnership results of triangular co-operation presented in Tool 1 are suggested. These indicators, which are shared by all partners, have a two-fold objective: first, they could be used when designing new triangular co-operation projects. Second, they could be used when designing evaluations of existing triangular co-operation projects.

The indicators are suggestions and should be adapted to suit the context of individual projects and/or evaluations. It is not desirable nor feasible to incorporate all indicators.

Some partnership outputs and outcomes cannot be planned, but are rather ‘serendipity’ in the sense that solutions coincidentally and naturally arise in the project through the interaction of all partners, as the example in Box 1 shows. Also, the different outcomes and outputs are often closely linked, for instance it may be difficult to draw the line between “complementarity” and “co-creation”. This toolkit might appear to be linear or restrictive in trying to capture and categorise the partnership results into six possible areas, whereas in reality, these are often intertwined.

Qualitative and quantitative methods may be used to monitor progress, depending on the nature of the indicators. For instance, indicators looking at perceptions and examples can provide both qualitative information as well as a percentage when applying a mix of methods. The methods to use might include interviews, surveys, focus groups, participatory observation and analysis of project documents: e.g. monitoring protocols, budget plans, agreements and regulations.

Box 1: Complementarity in disaster risk management between Brazil – Mozambique - Germany

The triangular co-operation arrangement provides Brazilian and German technology to measure the water levels in rivers in Mozambique. Germany has developed advanced technological solutions and Brazilian experts have contributed their knowledge and adapted them to the climatic conditions of Mozambique. What both providers had not taken into account is that the measurements of water levels would be transmitted via internet. This poses problems in the Mozambican context due to power cuts and no consistent availability of internet connections. The solution came from the Mozambican experts who came up with the idea to transmit the results via the cell phone network, a solution that works well in the African country’s context. Thus, each expert brought in specific, complementary experiences and expertise to make this project work.



1) Building ownership and trust

Outcomes	Value added of triangular partnership
Ownership is exerted by all partners involved, e.g. by contributing resources to the project.	Ownership is increased and trust is established between the partners involved
All partners take responsibility for the project management and implementation.	
A level of comfort is reached that may lead to trust among the partners involved, e.g. by administering each other's funds.	
Co-operation in other areas is facilitated (e.g. foreign policy, trade, and environment).	

Indicators to measure building ownership and trust

Ideas for indicators
1) Proportion of partners feeling valued (%) Partners feeling valued on a scale of 1 (very low) to 10 (very high)
2) Proportion of partners who felt they could influence the process (%) Partners feeling that they could influence the process on a scale of 1 (very low) to 10 (very high)
3) Dollar value of all contributions (e.g. in-kind, staff time, guarantees) by each partner (\$)
4) Partners trust each other with administering joint funds (yes/no)
5) Share of partners trusting each other with administering resources (yes/no)
6) Examples of concrete joint fund/resource administration (yes/no)
7) Proportion of partners who state that they trust advice from other partners (%) Partners trusting the advice from other partners on a scale of 1 (very low) to 10 (very high)
8) Estimate of share of project decisions taken jointly (%)
9) Proportion of project ideas being presented by the beneficiary partner (%)
10) Examples of activities that took place, following the project, including in other areas (e.g. trade, culture, etc.) following the project (yes/no)
11) Examples of joint meetings with relevant stakeholders (yes/no; number)
12) Examples of joint reporting of the partners (yes/no; number)

NB: Indicators looking at perceptions and examples can provide both qualitative data as well as a percentage when applying a mix of methods. For instance, when looking at examples you could record the narrative of the details that are being provided.



2) Promoting complementarity and increasing co-ordination in development co-operation

Outcomes	Value added of triangular partnership
Partners bring in complementary strengths, such as specific expertise or access to technology.	Partners make use of complementary strengths to achieve development results.
Access to a diversity of perspectives is granted by working with three or more partners.	
The partners co-ordinate their activities, also in other areas, leading to greater coherence of development approaches.	
Mechanisms of bilateral and multilateral co-operation, as well as with other stakeholders, as relevant, are strengthened.	
Activities of the triangular co-operation are aligned to the national development goals and strategies of the beneficiary partner(s).	
Innovations are acknowledged/incorporated in internal and external documents.	

Indicators to measure promoting complementarity and increasing co-ordination in development co-operation

Ideas for indicators
1) Number of cases that show the specific expertise/technology that partners bring into the project (number)
2) Share of local and international experts in a project (%)
3) Examples showing the complementarity between the needed capacities and expected exchange of experiences in the project (number)
4) Proportion of partners that feel that based on the project experience they will adapt their mechanisms of development co-operation in the future (%) On a scale of 1 (highly unlikely) to 10 (very likely) partners feel that based on the project experience they will adapt their mechanisms of development co-operation in the future
5) Examples that acknowledge/incorporate innovations that were generated from pooling expertise and resources of all partners (number)
6) Evidence of change/adaptation of development co-operation mechanisms (yes/no)
7) Examples of adapted technology and new equipment being used (yes/no; number)
8) Examples of triangular activities being aligned to national development goals and strategies (yes/no)
9) Evidence of greater co-ordination, also in other areas, among the partners involved (yes/no)

NB: Indicators looking at perceptions and examples can provide both qualitative data as well as a percentage when applying a mix of methods. For instance, when looking at examples you could record the narrative of the details that are being provided.



3) Sharing knowledge and learning jointly

Outcomes	Value added of triangular partnership
Knowledge is shared among the partners involved.	Partners share knowledge, learn jointly and continue exchanging experiences after the project ends.
Partners learn from each other.	
Capacity development is promoted among all partners.	
Commitment for capacity development is ensured, including for the roles and capabilities of providers.	
Partners step in for each other and work flexibly, especially in critical times of changes (e.g. elections).	

Indicators to measure sharing knowledge and learning jointly

Ideas for indicators
1) Perception of partners that knowledge is shared in the project (yes/no)
2) Proportion of partners that perceive that they are learning from the other partners (%)
3) Share of partners that can provide examples of joint learning (%; number)
4) Examples of concrete knowledge sharing (yes/no; no.)
5) Monetary value of budget spent on facilitating joint learning (\$)
6) Examples where the results of a joint learning process are being applied in the project (yes/no; number)
7) Evidence/examples that lessons learned/capacity developed is feeding into another activity/future project
8) Share of partners that apply their newly acquired capacities and skills in the project (%; number)
9) Examples where the project experience has contributed to changes in the partner institutions (yes/no; number), e.g. by a) changes in the perception among the leadership and staff b) institutional papers, memos, rules and regulations that address changes c) meetings taking place where changes have been discussed
10) Evidence of flexibility among the partners, e.g. one partner taking over the tasks of another partner in critical situations (yes/no)

NB: Indicators looking at perceptions and examples can provide both qualitative data as well as a percentage when applying a mix of methods. For instance, when looking at examples you could record the narrative of the details that are being provided.



4) Co-creating solutions and flexibility

Outcomes	Value added of triangular partnership
Partners share the same understanding of development challenges.	Partners co-create solutions to development challenges that are innovative, affordable, flexible and context-specific.
New ideas on how to react to development challenges have been developed jointly.	
Solutions that were fragmented before are brought together.	
Practical solutions to development challenges take into account experiences from all forms of development co-operation.	
Experts from the beneficiary partner contribute to delivering adapted, flexible and affordable solutions to development challenges.	
Experts with specific knowledge, e.g. in difficult co-operation contexts, such as fragile contexts, are mobilised e.g. from neighbouring countries.	

Indicators to measure co-creating solutions

Ideas for process indicators
1) Examples and share of solutions to development challenges that have been found jointly by the partners involved (%; number)
2) Examples capturing local knowledge to achieve project goals (yes/no; number)
3) Number of tools, systems and technology adapted from exchanges in the triangular co-operation project (number)
4) Examples of adapted tools/systems presented in the triangular co-operation project (number)
5) Examples of internal rules and regulations that are changed (yes/no; number)
6) Examples of policies that are changed (yes/no; number)
7) Examples of extending intellectual property rights (yes/no; number)

NB: Indicators looking at perceptions and examples can provide both qualitative data as well as a percentage when applying a mix of methods. For instance, when looking at examples you could record the narrative of the details that are being provided.



5) Enhancing the volume, scope and sustainability of triangular co-operation

Outcomes	Value added of triangular partnership
Additional resources (e.g. in-kind resources or funding), which were not budgeted for in the project, are mobilised.	Partners mobilise additional resources, networks and institutions to enhance the volume, scope and sustainability of triangular co-operation projects.
Additional partners or networks join the project.	
Partners co-operate beyond the project duration and scope, extending its sustainability.	
Successful experiences of bilateral and triangular co-operation are scaled up.	

Indicators to measure facilitation, scaling-up and sustainability

Ideas for indicators
1) Monetary value of additional resources beyond the initial project budget mobilised (\$)
2) X Activities continue beyond the project duration (yes/no; number)
3) Number of partnership agreements with external partners while the project is running
4) Perception of innovation in setting up additional partnerships (yes/no)
5) Examples of planned follow-up activities designed and implemented up to x months after project completion (number; yes/no)
6) Number of post-project follow-up activities based on the recommendations from the monitoring and evaluation reports (number)
7) Examples of (continued) co-operation beyond the project duration (yes/no; number)

NB: Indicators looking at perceptions and examples can provide both qualitative data as well as a percentage when applying a mix of methods. For instance, when looking at examples you could record the narrative of the details that are being provided.



6) Achieving global and regional development goals through strengthened partnerships for sustainable development

Outcomes	Value added of triangular partnership
Inter-cultural awareness and understanding are increased.	Through triangular co-operation projects, the partners involved contribute to achieving the SDGs by promoting more effective development co-operation and shaping a common understanding of international development.
Partners work towards a common understanding of development policy by implementing joint projects that are based on their combined knowledge, experience and funding.	
Successful experiences and good practices from the local level are promoted and disseminated, including at the global level.	
Multi-stakeholder approaches to development co-operation contribute to achieving the SDGs.	
Different types of stakeholders participate and effectively engage in the initiative, including the private sector, academia, civil society, private philanthropy, parliaments, and local governments.	

Indicators to measure achieving global and regional development goals through strengthened partnerships for sustainable development

Ideas for indicators
1) Examples of changes in the discourse on development co-operation policies (yes/no; number)
2) Examples of paying more attention to cultural differences, e.g. over time in project documents (yes/no; number)
3) Examples of shifts from short-term development co-operation to a long-term vision of development partnership (yes/no; number)
4) Examples of experiences and good practices that were created at the local level and then promoted globally (yes/no; number)
5) Evidence that project outcomes are aligned to SDG targets (yes/no; number)
6) Openness to engage with a diversity of stakeholders (no. of different types of partners, e.g. civil society, private sector, etc.)

NB: Indicators looking at perceptions and examples can provide both qualitative data as well as a percentage when applying a mix of methods. For instance, when looking at examples you could record the narrative of the details that are being provided.



TOOL 3: DESIGNING EVALUATIONS TO TAKE ACCOUNT OF THE VALUE ADDED OF TRIANGULAR CO-OPERATION

How to use Tool 3?

When working on the terms of reference for an evaluation or on the evaluation design, it may be useful to include 2-3 additional evaluation areas to critically assess the value added of triangular co-operation. Depending on who uses Tool 3 and for which purpose it does use it, only certain elements should be considered. It is neither desirable nor feasible to work with all of the material that is provided in this tool. Each evaluator will need to develop an individual methodology and approach to evaluating development and partnership results of triangular co-operation, and the evaluation ideas areas highlighted in this tool could be used to shape this design.

Tool 3 provides inputs on how to take account of the value added of triangular co-operation when designing evaluations. It is not meant to be a guide on “how-to-evaluate triangular co-operation”; rather it may provide inspiration on how partnership results of triangular co-operation could be assessed. Six evaluation matrices offer first ideas for overarching evaluation questions along the six areas identified in Tools 1 and 2. The matrices also provide ideas of possible ways to collect data. An evaluation matrix is a tool to support designing, planning and organising an evaluation, however the matrices in this tool are not standalone instruments. The evaluator may include some ideas from the matrices into the overall evaluation design and should adapt and change these to the project or programme at hand. Bearing in mind that evaluations should critically assess what works well and what does not in a project, this tool could also be used as well to reflect on any neutral or negative impact of triangular co-operation.



Evaluations use a wide range of sources and provide more in-depth information on the project, whereas monitoring data can provide rapid feedback to align the project objectives with its current implementation realities. As an alternative to evaluations, partners could use extensive monitoring data to extract lessons for steering and, if necessary, changing the direction of a triangular co-operation project.

Defining the scope of the evaluation and choosing evaluation criteria

The toolkit maps the identified range of possible benefits (Tool 1) and indicators (Tool 2) that can be used. It is an open toolkit that can be expanded and adapted, as needed. The toolkit uses an understanding of triangular co-operation where partners have three roles (facilitator, pivotal and beneficiary partners, see Tool 1), but it can be used as well when the partners involved have other



understandings of triangular co-operation. For instance, the UN Office for South-South Cooperation (UNOSSC) sees triangular co-operation as a support for South-South co-operation. Whatever understandings of triangular co-operation the partners have, ideally, they should agree on the standards and criteria to use for the project's evaluation. This implies that the partners discuss how to best mix different criteria or to come up with new ones to evaluate their specific project.

Different ways of evaluating development co-operation projects have been developed over the years by governments, international organisations, implementing institutions, research institutes, and evaluators worldwide. Members of the OECD Development Assistance Committee have agreed to a set of five evaluation criteria⁴ (OECD 1991). The DAC criteria are now being used globally for evaluations of North-South and South-South co-operation alike. Not all criteria need to be used for each evaluation and the evaluators often use additional or other criteria when evaluating projects and programmes – some of which also coincide with the principles emanating from the tradition of South-South co-operation. The five DAC evaluation criteria are:

- 1) **Relevance:** The extent to which the activity is suited to the priorities and policies of the partners involved.
- 2) **Effectiveness:** A measure of the extent to which an activity attains its objectives.
- 3) **Efficiency:** Measures the outputs - qualitative and quantitative - in relation to the inputs.
- 4) **Impact:** The positive and negative changes produced by a development intervention, directly or indirectly, intended or unintended.
- 5) **Sustainability:** Measures whether the benefits of an activity are likely to continue after the project is phased out. Projects need to be environmentally as well as financially sustainable

Various sets of principles and concepts derive from South-South co-operation declarations or methodological guidance by or for South-South providers including:

- **The Nairobi Outcome Document (2009):** This *United Nations General Assembly Resolution (A/RES/64/222, 21 December 2009)* presents a set of principles and elements applicable to South-South co-operation. These include respect for national sovereignty, non-interference, non-conditionality, equality, national ownership and independence, mutual benefit, demand-driven approach, horizontality, multi-stakeholder approach, capacity development and knowledge sharing, national well-being, national and collective self-reliance, and alignment to national and international development goals.
- **The Bogotá Statement Towards Effective and Inclusive Development Partnerships (2010):** This document acknowledges that South-South co-operation has a key role in capacity development through knowledge sharing, technology transfer and learning, and recognises this modality as an expression of collaboration and mutual interest between partner countries. It relies on national ownership and leadership, inclusiveness and multi-stakeholder engagement. It also recognises that South-South co-operation reflects solidarity and is a means to promote mutual benefit and horizontal partnerships.
- **The Ibero-American Programme for the Strengthening of South-South co-operation (PIFCSS):** In 2015, PIFCSS proposed the following five principles and criteria for triangular co-operation

⁴ The DAC criteria for evaluation are currently under discussion and might be revised. If such decisions are taken in the OECD's Network on Development Evaluation (EvalNet), this toolkit will be updated accordingly.



in the region – horizontality, mutual benefit, leadership of the beneficiary partner, effectiveness and efficiency, and mutual accountability.

The OECD DAC evaluation criteria and South-South co-operation principles not only inform how to evaluate the development results of a triangular activity, but also provide a good basis for evaluating partnership results. Mixing the different criteria and principles may lead to an initial set of common criteria that can be used when evaluating the value added of triangular co-operation. The evaluator can select among these criteria, as relevant to their triangular activity (e.g. relevance is related to a demand-driven activity and alignment to national and international development goals, see Table 2).

Table 2: Ideas to describe the link between specific partnership results and various evaluation criteria

Value added of triangular partnerships	Evaluation criteria
1) Ownership is increased and trust is established between the partners involved.	SSC principles: Demand-driven, leadership of the beneficiary partner, alignment to national and international development goals DAC criteria: Relevance, sustainability
2) Partners make use of complementary strengths to achieve development results.	SSC principles: horizontality, efficiency DAC criteria: Efficiency
3) Partners share knowledge, learn jointly and continue exchanging experiences after the project ends.	SSC principles: innovation and scalability, capacity development DAC criteria: Effectiveness
4) Partners co-create solutions to development challenges that are innovative, affordable, flexible and context-specific.	SSC principles: Mutual benefit, horizontality, effectiveness and efficiency, alignment to national and international development goals DAC criteria: Effectiveness, efficiency
5) Partners mobilise additional resources and institutions to enhance the volume, scope and sustainability of triangular co-operation projects.	SSC principles: Innovation and scalability, alignment to national and international development goals DAC criteria: Sustainability, efficiency
6) Through triangular co-operation projects the partners involved contribute to achieving the SDGs, promoting more effective development co-operation and shaping a common understanding of international development.	SSC principles: Alignment to national and international development goals, multi-stakeholder approach/participation DAC criteria: Impact

In the partnership spirit of triangular initiatives, all partners ideally agree on the scope, terms of reference and process for the evaluation of their project together. Depending on the size of the triangular co-operation project and the available resources, partners may decide to do a self-evaluation, evaluate parts of the project or commission an independent evaluation, without co-ordinating with the other partners. They may also think about joint evaluations in which, for instance, each partner names one member to create a joint evaluation team. Another option is that different partners share the evaluation burden and become responsible for evaluating separately the components of the triangular co-operation projects or programmes.

Against the background of these criteria, the following evaluation matrices propose questions and possible methods for collecting data on each of the six areas where triangular partnerships may add value. The evaluator can then pick and choose which questions seem most relevant to the project and add 2-3 additional questions to the overall evaluation design.



1) How to evaluate building ownership and trust?

Value added of triangular partnership	Evaluation questions	Possible methods for collecting data
Ownership is increased and trust is established between the partners involved.	How do the different partners influence the project process? What role do the partners have in the partnership and why they play this role? Which role did the others play?	Interviews Surveys Focus groups
	How do the different partners work together in the triangular co-operation? Is there an understanding of the obstacles and shortcomings among the partners? Do they feel their contributions are valued?	Interviews Analysis of monitoring protocols Surveys Focus groups
	Why would you/would you not administer funds of others in the triangular co-operation project?	Interviews
	How do the partners administer (joint) funds of the project? Why were certain funding/budget structures created?	Project document analysis Documentation of all resources brought in by the partners and how they are administered Budget commitments Focus groups

2) How to evaluate promoting complementarity and increasing co-ordination in development co-operation?

Value added of triangular partnership	Evaluation questions	Possible methods for collecting data
Partners make use of complementary strengths to achieve development results.	How can the relation between the partners' different expertise and technologies be described? Which expertise has been brought in by which partner?	Interviews Analysis of project documents Focus groups <i>Then:</i> Comparison in a table where the different expertise/technology that partners brought in is described in one column. A second column could then illustrate how this expertise/technology relates to the project results.
	How interested are the partners to learn about the expertise/technology of the other partners? Do they critically reflect their own expertise/technology?	Interviews Surveys Focus groups
	How can the relation of local and international experts be assessed? In comparison to other project experiences, were there any differences in terms of complementarity and cost-benefit?	Interviews Surveys Focus groups



3) How to evaluate sharing knowledge and learning jointly?

Value added of the triangular partnership	Evaluation questions	Possible methods for collecting data
Partners share knowledge, learn jointly and continue exchanging experiences after the project ends.	How do the partners share their experiences among each other? Are they also ready to share products that are still work in progress – why/why not? Are they listening to others and do they feel listened to when brainstorming?	Interviews Analysis of project documents Surveys
	Could the partners describe a process where the result of a joint learning exercise was applied in a triangular co-operation project?	Interviews Process mapping Focus groups
	How do the partners discuss continuing the exchange after the project ends? Will the partners continue sharing knowledge and experiences?	Interviews Analysis of project documents Focus groups
	Looking back, what was the most valuable experience for each partner in learning from the others?	Interviews Surveys Focus groups

4) How to evaluate co-creating solutions and flexibility?

Value added of triangular partnership	Evaluation questions	Possible methods for collecting data
Partners co-create solutions to development challenges that are innovative, affordable, flexible and context-specific.	How was the development challenge/the issue that the triangular co-operation addresses discussed among partners? Which changes took place over time?	Interviews Surveys Focus groups Analysis of project documents
	Which expertise did the partners have before working in the project? What triggered the idea to bring different solutions together and co-create, based on this expertise?	Interviews Surveys Focus groups Analysis of project documents
	How did the partners ensure a good balance between openness to co-create, flexibility and internal concerns, such as intellectual property rights?	Interviews Surveys Analysis of project documents



5) How to evaluate enhancing volume, scope and sustainability?

Value added of triangular partnership	Evaluation questions	Possible methods for collecting data
Partners mobilise additional resources, networks and institutions to enhance the volume, scope and sustainability of triangular co-operation projects.	What additional resources were mobilised beyond what was planned for the triangular co-operation project? What would be the approximate/estimated monetary value of these additional resources?	Interviews Surveys Analysis of project documents
	Why did the partners decide to work with external partners (e.g. NGOs, research institutions, private sector, etc.) while the project was still running?	Interviews Surveys Analysis of project documents
	How do the additional partnerships bring an innovative element to the triangular co-operation?	Interviews Focus groups
	Could the partners name examples of follow-up activities that were designed and implemented up to X months after the project was completed? If yes, how many?	Interviews Focus groups
	Could the partners name examples of continued co-operation beyond the project duration? How were the networks, platforms or individual exchanges institutionalised after the project ended?	Interviews Surveys Focus groups

6) How to evaluate achieving global and regional development goals through strengthened partnerships for sustainable development?

Value added of triangular partnership	Evaluation questions	Possible methods for collecting data
Through triangular co-operation projects, the partners involved contribute to achieving the SDGs by promoting more effective development co-operation and shaping a common understanding of international development.	How do the partners discuss the ways that their project aligns to regional and global goals, e.g. to the SDGs?	Interviews Analysis of project documents Focus groups
	Do the partners discuss their countries' positions in regional and global fora openly? How do they deal with different opinions?	Interviews Analysis of project documents Focus groups



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GLOSSARY OF KEY TERMS⁵

Term	Definition
Activity	Actions taken or work performed through which inputs, such as funds, technical assistance and other types of resources are mobilized to produce specific outputs.
Base-line study	An analysis describing the situation prior to a development intervention, against which progress can be assessed or comparisons made.
Benchmark	Reference point or standard against which performance or achievements can be assessed.
Data Collection Tools	Methodologies used to identify information sources and collect information during an evaluation. Note: Examples are informal and formal surveys, direct and participatory observation, community interviews, focus groups, expert opinion, case studies, literature search.
Development objective	Intended impact contributing to physical, financial, institutional, social, environmental, or other benefits to a society, community, or group of people via one or more development interventions.
Effect	Intended or unintended change due directly or indirectly to an intervention. Related terms: results, outcome.
Effectiveness	The extent to which the development intervention's objectives were achieved, or are expected to be achieved, taking into account their relative importance. Note: Also used as an aggregate measure of (or judgment about) the merit or worth of an activity, i.e. the extent to which an intervention has attained, or is expected to attain, its major relevant objectives efficiently in a sustainable fashion and with a positive institutional development impact.
Efficiency	A measure of how economically resources/inputs (funds, expertise, time, etc.) are converted to results.
Evaluation	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 fulfilment of objectives, development efficiency, effectiveness, impact and sustainability. An evaluation should provide information that is credible and useful, enabling the incorporation of lessons learned into the decision-making process of both recipients and donors. Evaluation also refers to the process of determining the worth or significance of an activity, policy or program. An assessment, as systematic and objective as possible, of a planned, on-going, or completed development intervention.
Ex-ante evaluation	An evaluation that is performed before implementation of a development intervention.
Ex-post evaluation	Evaluation of a development intervention after it has been completed. Note: It may be undertaken directly after or long after completion. The intention is to identify the factors of success or failure, to assess the sustainability of results and impacts, and to draw conclusions that may inform other interventions.
External evaluation	The evaluation of a development intervention conducted by entities and/or individuals outside the donor and implementing organisations.
Feedback	The transmission of findings generated through the evaluation process to parties for whom it is relevant and useful so as to facilitate learning. This may involve the collection and dissemination of findings, conclusions, recommendations and lessons from experience.
Impacts	Positive and negative, primary and secondary long-term effects produced by a development intervention, directly or indirectly, intended or unintended.
Independent evaluation	An evaluation carried out by entities and persons free of the control of those responsible for the design and implementation of the development intervention. Note: The credibility of an evaluation depends in part on how independently it has been carried out. Independence implies freedom from political influence and organizational

⁵ Based on OECD (2002): "Glossary of Key Terms in Evaluation and Results Based Management", URL: <http://www.oecd.org/development/peer-reviews/2754804.pdf>

	pressure. It is characterized by full access to information and by full autonomy in carrying out investigations and reporting findings.
Indicator	Quantitative or qualitative factor or variable that provides a simple and reliable means to measure achievement, to reflect the changes connected to an intervention, or to help assess the performance of a development actor.
Inputs	The financial, human, and material resources used for the development intervention.
Joint evaluation	An evaluation to which different agencies and/or partners participate. Note: There are various degrees of “jointness” depending on the extent to which individual partners co-operate in the evaluation process, merge their evaluation resources and combine their evaluation reporting. Joint evaluations can help overcome attribution problems in assessing the effectiveness of programs and strategies, the complementarity of efforts supported by different partners, the quality of aid co-ordination, etc.
Logical framework (Logframe)	Management tool used to improve the design of interventions, most often at the project level. It involves identifying strategic elements (inputs, outputs, outcomes, impact) and their causal relationships, indicators, and the assumptions or risks that may influence success and failure. It thus facilitates planning, execution and evaluation of a development intervention. Related term: results based management.
Monitoring	Monitoring is a continued function that uses systematically collected data on specified indicators to provide management and the stakeholders involved in triangular co-operation with information on the progress of achieving the project objectives.
Outcome	The likely or achieved short-term and medium-term effects of an intervention’s outputs.
Outputs	The products, capital goods and services which result from a development intervention; may also include changes resulting from the intervention which are relevant to the achievement of outcomes.
Partners	The individuals and/or organisations that collaborate to achieve mutually agreed upon objectives. Note: The concept of partnership connotes shared goals, common responsibility for outcomes, distinct accountabilities and reciprocal obligations. Partners may include governments, civil society, non-governmental organisations, universities, professional and business associations, multilateral organisations, private companies, etc.
Performance	The degree to which a development intervention or a development partner operates according to specific criteria/standards/ guidelines or achieves results in accordance with stated goals or plans.
Project evaluation	Evaluation of an individual development intervention designed to achieve specific objectives within specified resources and implementation schedules, often within the framework of a broader program. Note: Cost benefit analysis is a major instrument of project evaluation for projects with measurable benefits. When benefits cannot be quantified, cost effectiveness is a suitable approach.
Project or program objective	The intended physical, financial, institutional, social, environmental, or other development results to which a project or program is expected to contribute.
Results	The output, outcome or impact (intended or unintended, positive and/or negative) of a development intervention.
Results Chain	The causal sequence for a development intervention that stipulates the necessary sequence to achieve desired objectives beginning with inputs, moving through activities and outputs, and culminating in outcomes, impacts, and feedback. In some agencies, reach is part of the results chain.
Results framework	The program logic that explains how the development objective is to be achieved, including causal relationships and underlying assumptions.
Results-Based Management (RBM)	A management strategy focusing on performance and achievement of outputs, outcomes and impacts.

Risk analysis	An analysis or an assessment of factors (called assumptions in the logframe) affect or are likely to affect the successful achievement of an intervention's objectives. A detailed examination of the potential unwanted and negative consequences to human life, health, property, or the environment posed by development interventions; a systematic process to provide information regarding such undesirable consequences; the process of quantification of the probabilities and expected impacts for identified risks.
Stakeholders	Agencies, organisations, groups or individuals who have a direct or indirect interest in the development intervention or its evaluation.
Sustainability	The continuation of benefits from a development intervention after major development assistance has been completed. The probability of continued long-term benefits. The resilience to risk of the net benefit flows over time.
Terms of reference	Written document presenting the purpose and scope of the evaluation, the methods to be used, the standard against which performance is to be assessed or analyses are to be conducted, the resources and time allocated, and reporting requirements. Two other expressions sometimes used with the same meaning are "scope of work" and "evaluation mandate".

