IPDET’S GLOBAL OUTREACH STRATEGY
PRINCIPLES AND CRITERIA
1. RATIONALE

Founded in 2001, the International Program for Development Evaluation Training (IPDET) is an executive training program that aims to provide managers and practitioners in evaluation with the generic tools required to evaluate policies, programs, and projects at the local, national, regional, and global levels, as well as to commission, manage and especially use those evaluations for decision-making. IPDET is beneficial to evaluators with little to no prior knowledge and experience in evaluation, as well as experienced evaluators, commissioners, decision makers, and policy makers from NGOs, ministries/public administration and parliamentarian institutions, bi- and multilateral development partners, think tanks, universities, private firms, as well as parliamentarians from all over the world. Over the past 20 years, more than 4,000 professionals have received training during the three-to-four-week onsite program (since 2018 at the University of Bern) and/or the recently introduced virtual program and joined the global and multidisciplinary IPDET community.

IPDET’S GROWING IMPORTANCE

Going forward IPDET envisions expanding its activities to multiple parts of the globe. Within the evolving global institutional landscape of capacity development in the monitoring and evaluation context, IPDET will grow in importance, because:

- there remains an **unmet demand** for evaluation capacity development activities;
- audiences remain who do not have the ability or resources to attend the Bern program; courses and guidance can better be tailored to the **needs of specific audiences** in different regions;
- highly qualified professionals from emerging economies are not always part of visible networks and represent **underserved audiences**;
- the evaluation capacity development market is increasingly characterized by **creative partnerships**;
- the **nature of demand** for learning about evaluation has evolved;
- evaluation has increasingly been used to inform both donors and key stakeholders in partner countries, thus creating greater **local ownership** of evaluation at the country level.

IPDET’S MISSION IS ALIGNED WITH THE GLOBAL EVALUATION INITIATIVE (GEI):

IPDET cooperates with strategic partners to build a global, inclusive, multidisciplinary community committed to evaluative evidence improving development outcomes.

We create space for people engaged in evaluation to come together to learn, exchange knowledge, and collaborate.
This paper outlines IPDET’s underlying understanding of evaluation and the principles and criteria of IPDET's global outreach strategy, derived from its systemic Evaluation Capacity Development (ECD) approach.

The principles establish IPDET’s distinctiveness and value proposition and at the same time explicitly adopt a perspective of being embedded in and having a collaborative role in the ECD ecosystem.

**IPDET’S CORE VALUES ARE APPLIED IN ITS GLOBAL OUTREACH STRATEGY:**

**Inclusive and global** – IPDET leverages contextual trainings for different skills and experience levels in different regions; enables diverse audiences to come together in an open learning environment; and IPDET’s alumni network provides a platform to interact and share information globally.

**Participatory and engaging** – IPDET utilizes specific didactics for adult learning to engage participants actively; and participants share specific cases from their context and contribute their experiences and knowledge to the learning environment.

**Excellence** – IPDET offers high quality trainings on the latest, cutting-edge topics that are relevant to the respective region, with practical application/simulation.
2. IPDET’s Underlying Understanding of Evaluation

In line with the classic definition of Donna Mertens (1998: 219), evaluation means “the systematic investigation of the merit of worth of an object (program) for the purpose of reducing uncertainty in decision making” (similar Scriven 1991: 139). Rossi, Freeman and Lipsey (1999: 4) add a methodological approach to the intended purpose: “Program evaluation is the use of social research procedures to systematically investigate the effectiveness of social intervention programs”.

Even if evaluations are not limited to programs, **IPDET follows this fundamental understanding of evaluation and considers evaluation as a part of applied social research that aims to contribute to the solution of practical socio-political problems by providing systematic, empirical foundations for non-scientific decision-making processes.** To this end evaluation makes use of the whole spectrum of social scientific theories, concepts and research methods, and the same rules govern the gathering of valid and reliable data which are fundamental to science. (c.f. Stockmann 2011: 17)

As we understand evaluation, we assume that theories, approaches and methodology are universal, but that these must of course be adapted to the respective socio-cultural context conditions in countries and regions. This refers not only to the application in countries and regions, but also within social groups and milieus within a country.

For example, when a study is conducted on the power relations within governing elites, different theories, approaches and methods must be applied than when studying kindergartens or drug milieus.

If evaluation is based on this understanding of science and therefore the quality criteria of empirical social research (objectivity, reliability and validity) are also valid in the field of evaluation, **it should not be forgotten that evaluation differs from classical research in several aspects.**

While fundamental research aims to test theories and develop them further, multiply insights, provide explanations, convey an understanding of relationships, without asking whether or not this is useful for society, evaluation is oriented toward concretely prescribed research targets and has to allow its usefulness to be measured in terms of the achievement of those targets.

While it is society itself which makes the funding for classical research available, typically awarded via research communities or foundations in accordance with principles of excellence, evaluation is, as a rule, carried out as an assignment and commissioners define the evaluand and targets, issue invitations to tender for evaluation projects, and award contracts using certain criteria, in which scientific integrity is not always the most important consideration.
The definition and specification of their goals is thus geared to non-scientific cognitive interests and utilization contexts (cf. Kromrey 2002: 96f., Stockmann u. Meyer 2013:57).

In the context of development evaluation, evaluation was initially heavily driven by donor organizations, with the aim of improving development programs jointly with local partners. Early on, evaluation standards and criteria were developed by donor countries and implementation agencies, together with multilateral organizations such as the OECD, the World Bank and several UN-organizations. In recent years, many countries have established strong, domestically driven evaluation agendas and work on the establishment of initiatives to develop centralized evaluation functions; these developments have led to a growth in the domestic supply and demand for (culturally and contextually relevant) evaluation (cf. Stockmann, Meyer, Taube 2020, Stockmann & Meyer 2021). Additionally, non-governmental organizations have developed intensive partnerships and fostered the development of participatory evaluation approaches, aiming at empowerment. As a result, development evaluation has expanded to include a broad spectrum of evaluation approaches, ranging from rigorous impact evaluations that primarily target scientific preciseness for causal attribution to transformative evaluations that emphasize inclusion and collaboration within the evaluation process and strengthen the inclusion of the civil society organization in societal development.

Another essential difference between evaluation research and classical research is that evaluations are always linked to assessments. Yet, there are not subjective value judgements on the part of the evaluation researcher, but 'technical judgements', which are based on the criteria previously selected and made transparent, which are therefore intersubjectively verifiable. An important discussion in development evaluation concerns the degree of including perspectives of beneficiaries and other stakeholder groups. This primarily refers to the selection of the assessment criteria and how to balance sometimes differing viewpoints of the various stakeholders.

Accordingly, evaluation in our understanding is situated in a tense relationship between scientificness and usefulness. On one hand, evaluation is part of social empirical science and has to comply with its rules and standards. On the other hand, evaluation is intended to provide usable results for the improvement of social practice (cf. Stockmann u. Meyer 2013. 56ff.).

In development evaluation, these activities target improvements in emerging economies and support marginalized people. Global action programs and goals like the Agenda 2030 and the Sustainable Development Goals provide guidelines for such kind of activities, and evaluation is supposed to assist the achievement of these goals.

In sum, IPDET supports the idea of developing a shared understanding of evaluation as outlined above at least with respect to the core contents and competences it involves. Despite global differences regarding cultural specificities and evaluation tasks, there are also a number of globally accepted methodological standards and ethical aspects that should be taught to all professional evaluators. Moreover, we believe in global learning, sharing of experiences and benefitting from the experiences of others.
3. IPDET’S SYSTEMIC EVALUATION CAPACITY DEVELOPMENT APPROACH

At IPDET, we share the widely recognized understanding that evaluation does not only help support good governance and optimize the efficiency and effectiveness of the executive branch, but also strengthens civil society in its democratic rights. We are convinced that evaluation can be a tool to:

- Ground political decisions in an evidence base;
- Adapt political strategies and programs to the needs and values of citizens;
- Make programs more efficient, effective and sustainable;
- Make government action transparent and strengthen political dialogue with citizens;
- Increase opportunities for participation by citizens.

This results in four central functions for evaluation (cf. Stockmann 2008: 62):

Knowledge: for political and administrative decisions, evidence-based policy and good governance;

Learning: to increase efficiency, effectiveness and sustainability of policies, programs, etc.;

Oversight: for assessments of government action by audit courts or civil society initiatives;

Legitimacy: if evaluation results are made transparent, they contribute to public dialogue, increase the credibility of policymaking, and enable good governance.

In many countries, the will to use evaluation in this sense is already well developed, but the structures and qualifications needed for implementation are still missing. This is where Evaluation Capacity Development (ECD) provides the necessary knowledge and skills, enabling partners across the globe to set up the structures and processes needed to use evaluation in such a way that it fulfills the above-mentioned functions.

If ECD is embedded in a systemic approach, it becomes evident that education and advanced training in the field of evaluation are necessary but not sufficient to achieve this task. ECD is much broader. It includes everything needed to create the necessary conditions for the institutionalization of evaluation structures and processes in governmental and non-governmental organizations, societal subsystems (e.g. health system, labor market, etc.), legislative bodies and civil society.
For this reason, the IPDET ECD strategy is based on a systems approach, which implies that services or programs in principle (in the state, civil society and economy) are provided by organizations which interact with surrounding systems (cf. Stockmann 2008, Stockmann u. Meyer 2013).

In the following figure, the constituting elements of an organization are outlined in their significance for evaluation in general and, in particular, for ECD (see Fig. 1).

Source: Stockmann 2011, p 43
### GOALS

The goals of an organization establish a common reference point through which the personnel can be managed. In terms of evaluation, this means clarifying for what purposes evaluation should be used in an organization.

### EMPLOYEES

The members of an organization – the employees – are responsible for defining goals and their implementation. Top and upper management play a prominent role in ensuring that evaluation can be firmly and sustainably anchored in an organization. ECD must ensure that the staff is able to fulfill the various tasks defined by management, which means that different ECD measures are required.

### ORGANIZATIONAL STRUCTURE

The formal structure of an organization consists of set rules, which are laid down in manuals, guidelines, etc. With regard to evaluation, this means that the appropriate structures, processes and formal regulations must be established, so that evaluation can be sustainably anchored in an organization. ECD must therefore enable personnel to develop evaluation policies, guidelines, practical handbooks, manuals, etc.

### TECHNOLOGY

Technology is not only technical equipment with which inputs can be transformed into outputs; it also includes knowledge of these processes. In terms of evaluation, this means that the necessary technical equipment (e.g., PC and computer programs) is available and can be used by the responsible personnel. ECD is required to provide the appropriate application knowledge.

### FINANCIAL RESOURCES

Without support or self-financing, an organization cannot ensure its long-term existence. Sufficient financial resources must be made available for implementing or commissioning evaluations. Since resources in an organization are not unlimited, this means that the task of an organizational evaluation system must correspond to the scope of available resources and vice versa. For ECD, this means that the management of an organization must be given at least a sense of how much funding is required for specific evaluation tasks.

### ENVIRONMENT

If the context – the system environment of an organization with which it interacts – is taken into consideration, then it will become clear which content- and subject-related competencies are necessary in relation to evaluation. For example, if an organization is part of the health system, other qualifications specific to the health sector are required, which may differ from requirements for other sectors, such as education. This means that, in addition to evaluation expertise, content-specific knowledge and skills related to the context of the (sub)system are required.

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* Compared in detail to Stockmann 2020; Stockmann, Krapp and Meyer 2020

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**What are the consequences of this systemic analysis for the development of ECD measures?**

In order to establish evaluative structures and processes in an organization that lead to a rationalization of policy and administrative management, it is necessary to offer target group-specific training courses, which are reflected in the IPDET ECD pyramid (see Fig. 2).
Even though these are different formats, they all follow a common didactic concept of combining theory and practice with real life examples from the specific regional context. The following criteria have been derived from the IPDET ECD pyramid to guide the decision on which activities should be carried out beyond the program in Bern. Independently on where IPDET offers take place, the contents are based on the understanding of evaluation outlined above.
4. PRINCIPLES AND CRITERIA OF IPDET’S GLOBAL OUTREACH

As part of its Global Outreach strategy, IPDET is open and responsive to requests from organizations around the world that seek ECD support. As IPDET is embedded in the Global Evaluation Initiative (GEI), IPDET is therefore committed to GEI’s core values of sustainability, cultural responsiveness, innovation, country ownership, collaboration, inclusion, and excellence, as well as its focus on supporting global public goods.

Requests for support that align with these principles are reviewed by IPDET as possible outreach activities. In order to prioritize and select which requests IPDET is able to support, transparent and comprehensible criteria are necessary. These criteria are geared to the objectives and comparative strengths of IPDET as outlined above and insights gained from a systemic analysis for a global outreach evaluation capacity approach, depicted in the IPDET ECD pyramid (Fig. 2).

In detail, the following criteria guide the selection process.

4.1 OVERARCHING CRITERIA

The courses described in the ECD pyramid as “Comprehensive Basic Course” (or Core Course) and “Thematic Advanced Courses” form the heart of the IPDET program. These courses include:

1. A one-week core course on the fundamentals level.

Participants gain a comprehensive overview of evaluation and how to do it. The course is designed for those with little prior evaluation experience or training and for those seeking to refresh and update their basic knowledge. In seven modules, participants learn about the key concepts and approaches, methods, processes, standards and tools for the planning, implementation, and utilization of evaluation.

2. Two weeks of workshops are structured according to two streams:

1) The consolidation stream consists of workshops that solidify and deepen conceptual knowledge and enhance practical skills of evaluation basics as a follow up to the core course.

2) The specialized stream consists of workshops that explore methodological and thematic topics on basic and advanced levels, including cutting-edge and current development issues.
These course formats are offered every year during the three-week onsite program at the University of Bern. The interactive learning environment combines theory and practice through modern didactics. In 2019, the core course underwent some reforms:

- **A new curriculum** that utilizes innovative didactics for adult learning and a new group work format has been developed and applied;
- Special attention was paid to ensure that the wide variety of **participant experiences** is valued;
- for the first time in IPDET history, the core course was taught by a **dynamic team** of five instructors.

The core course and workshops are taught by global experts from different regions of the world. Specific didactics and group work consider how to integrate different perspectives and value the wide variety of participant experiences.

IPDET comprises a vibrant community of professionals in the field of evaluation from all over the world. This is valued throughout the program delivery in Bern. We offer spaces and various leisure activities to meet, connect and exchange with each other. The Participant Forum, Peer-to-Peer Sessions, and visits to Swiss organizations are a great opportunity to meet other participants and network. Keynote speeches from leading personalities in relevant organizations provide further possibilities for learning and exchange with experts in the field.

As outlined above, the **IPDET program in Bern represents a unique setting for learning, exchanging, interacting and networking in an international and interdisciplinary environment**, which has been highly valued by the community since the program began 20 years ago. **The Bern program is and will remain the centerpiece of IPDET.** Similar offerings in other locations are not intended.

The two workshop streams allow participants to customize their schedule according to their particular needs and interests. They may choose from a total of 24 different workshops on a variety of topics over the two weeks.
4.2 TARGET GROUP SPECIFIC CRITERIA

As shown in the systemic IPDET ECD approach, evaluation can only be sustainably anchored in countries if institutional structures and processes are put in place in the political, social and professionalization system (see Stockmann, Meyer, Taube 2020 and Stockmann and Meyer 2020).

This means that ECD cannot limit itself to those persons in governmental and non-governmental organizations who plan, commission, control, or carry out evaluations themselves, nor to external evaluators. Rather, it has to be set in the political, social and professionalization system and on different institutional levels.

In the political and social system, key actors who can use evaluation results for decision-making include top decision makers in the government, ministries, parliaments, and civil society and non-governmental organizations.

In order for this to happen, these persons must understand the usefulness of evidence-based policy and the role of evaluation in political decision-making. Respective awareness building can only be developed in workshops/meetings of short duration. For this reason alone, they cannot be held in Bern, but are rather better suited to onsite programs in-country. If possible, these programs should take place onsite within specific organizations, country, or regions.

This also applies to the second target group in the political and social system: members of the upper or middle management of organizations. They do not carry out evaluations themselves, but they may commission or manage them.

In addition to the awareness building aspect, this management component must be taken into account in ECD workshops. These types of courses (lasting two to three days) can be held both in Bern and in the participants’ home countries (preferably in regional clusters).

WHO CAN USE EVALUATION FOR DECISION-MAKING?

>>> Top decision makers of governmental organizations: members of governments, ministries and parliaments.

>>> Upper and middle management of civil society and non-governmental organizations.
Civil society plays an important oversight role in the political system of democratic societies. Organizations, networks and citizens’ movements can not only insist that evaluations of political institutions be carried out and the results used in socio-political debates, but can also initiate or conduct evaluations themselves. This is currently the case, for example, in countries with weak state structures in the context of social accountability initiatives (see Stockmann and Röhrig 2015).

The IPDET program in Bern addresses also civil society stakeholders. However, if the request of support is for the evaluation projects carried out by civil society, such as those related to social accountability initiatives, then this can only be done locally.

While the political and social system acts as a kind of client for evaluations, the professional system must ensure a high-quality supply of evaluation expertise. This includes the qualification of trainers and lecturers, who are important as multipliers for the training and further education of national evaluators. This is not only a matter of providing theoretical knowledge (which is often the case), but above all of practical experience. This also applies to young, emerging evaluators. In both cases, it is more a question of providing practical experience in conducting evaluations. This experience can be acquired by conducting evaluations accompanied by mentors and through tutorials. For this reason, respective IPDET offerings should be conducted locally, i.e. in a regional context.

In any case, the professionalization of evaluation also includes the establishment of academic courses in the form of diploma and master's degree programs. Here, IPDET could provide advice as well as support in promoting university cooperation.

Professionalization of evaluation does not only include the implementation of training and further education structures, but also the implementation of national and regional Voluntary Organizations for Professional Evaluation (VOPEs), the establishment of discussion forums or networks, the founding of evaluation journals, etc. The direct support of such activities is not regarded as a task of IPDET. However, IPDET recognizes VOPEs as important actors in advancing evaluation as a profession in all parts of the world, as they bring together evaluation practitioners from various fields, including government, academia and non-governmental organizations, and aim to influence organizational and national evaluation policies for the benefit of society. IPDET supports VOPE members in strengthening their individual capacities by providing priority access to the Bern program. As an indirect effect, IPDET alumni strengthen the institutional capacities of VOPEs. Furthermore, wherever IPDET implements global outreach activities, it will consider including the respective VOPEs, either as partners or as part of the target audience.
4.3 COUNTRY CRITERIA

Overall, GEI aims to support developing countries where there is a particular need for ECD. The selection decisions of IPDET are also based on this prioritization.

Which ECD goals are to be pursued within a country and with which target groups cooperation should primarily take place - as shown in the IPDET ECD pyramid - depends on the demand of the partner country, but also on whether these correspond to the ECD strategy and the key strengths of IPDET.

This means that evaluation should not only contribute to the uptake of rational decisions based on evidence in order to increase the effectiveness and efficiency of government action, but also that evaluation is used as an instrument of social enlightenment and learning to legitimize political action (as presented in chapter 3). IPDET’s cooperation, in general and particularly in the context of its global outreach strategy, is not only limited to state actors of the executive branch, but also to legislative institutions such as parliaments and to civil society. Particularly in fragile states, cooperation with civil society organizations may be of strategic importance, because they can act as advocates for using evaluation for evidence-based decision making and promote good governance.

4.4 PARTNERSHIP CRITERIA

A cooperative and participatory perspective is inherent in IPDET’s strategy. This refers, first of all, to partnerships that enrich the onsite program (for example, the engagement of instructors, key note speakers, etc. from CLEAR, UNDP’s IEO, IEG, etc.) and provide advice on how to further develop the program (for example, with regional VOPEs, EvalPartners, IPDET Advisory Board).

Furthermore, to achieve synergies, better meet specific regional demands, and adequately consider cultural and regional specificities, IPDET seeks possible partners to deliver respective offers jointly in different countries.

Therefore, the possibility to collaborate with others is a guiding principle when deciding to “go regional”. These partners could be CLEAR centers, UN country offices, local training providers, think tanks, universities, NGOs, VOPEs, international initiatives like EvalPartners, and above all, the extensive IPDET alumni network. As IPDET alumni work in different organizations in different sectors all around the world, IPDET aims to leverage their potential by setting up cooperation formats and including them in the faculty of various global outreach activities.

The partnership criteria are guided by IPDET’s Evaluation Capacity Development strategy, which outlines different measures for different target groups under a systemic perspective on basis of demand and supply driven considerations. Consequently, partnerships will depend on which institutions express demand within the region and what needs for evaluation capacity development are identified. In that sense, it is expected that the cooperating actors apply their knowledge to initiate change in their institutional environment themselves.
5. APPLICATION OF THE PRINCIPLES AND CRITERIA

5.1 CONTENT-RELATED APPLICATION

Based on the IPDET ECD pyramid, global outreach activities aim to engage the following target groups with the following objectives:

<table>
<thead>
<tr>
<th>TARGET GROUP</th>
<th>OBJECTIVES</th>
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<tbody>
<tr>
<td>Top-Decision makers in governmental and non-governmental organizations</td>
<td>• Improve their understanding regarding the usefulness of evidence-based policy and evaluation, so that they demand evaluations, provide financial resources for establishing M&amp;E systems, and use the results for decision-making.</td>
</tr>
<tr>
<td>Upper and middle management in governmental and non-governmental organizations</td>
<td>• Build awareness and improve the ability to plan and manage evaluations and to communicate the results to decision-makers or to use the results for decision-making themselves.</td>
</tr>
<tr>
<td>Civil society organizations</td>
<td>• Build awareness, so that evaluations are requested from governmental organizations and to make evaluation useful for their own organizations</td>
</tr>
<tr>
<td>Trainers, lecturers for evaluation</td>
<td>• Training of trainers for education and further training in evaluation.</td>
</tr>
<tr>
<td>Young and emerging evaluators</td>
<td>• Provide theoretical evaluation knowledge and evaluation practice in order to strengthen and broaden the market of local evaluators</td>
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</tbody>
</table>
The illustrated criteria guide IPDET in assessing which measures for which target group should be implemented in which country to achieve the intended objectives. Part of the process will be the decision whether the activities are to be implemented onsite, online or in a blended format.

The principles apply to two different scenarios:

1. **Demand oriented strategy**
   IPDET receives a request for support in a specific country/region; the Steering Group assesses and selects the request according to the principles and criteria and the requester’s underlying rational for support.

2. **Supply oriented strategy**
   IPDET develops specific projects based on the principles and criteria and the intended target group’s evaluation training needs, and approaches possible partners and target groups for implementation.
5.2 APPLICATION FOR THE SELECTION

The application of the principles and selection criteria are represented in Fig. 3.

6. REFERENCES


18  IPDET’S GLOBAL OUTREACH STRATEGY – PRINCIPLES AND CRITERIA

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