

Review of the Development Effectiveness of the  
Inter-American Development Bank (IDB)

**2008 - 2013**

March 2015

## Preface

The Development Evaluation Division of Canada's Department of Foreign Affairs, Trade and Development (DFATD) wishes to recognise all who have contributed to this review. Our thanks go first to the independent team at the consulting firm Universal Management Group, comprised of Senior Evaluator Katrina Rojas and Consultant Elisabetta Micaro.

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From DFATD's Development Evaluation Division, Gabrielle Biron Hudon managed the exercise, and Andrés Velez-Guerra oversaw it.

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## List of Abbreviations

CIDA	Canadian International Development Agency
COMPAS	Common Performance Assessment System
CPE	Country Program Evaluation
CRF	Corporate Results Framework
DAC-EVALNET	Network on Development Evaluation
DEF	Development Effectiveness Framework
DEO	Development Effectiveness Overview
DFATD	Foreign Affairs, Trade and Development Canada
FSO	Fund for Special Operations
IAG	Independent Advisory Group
IDB	Inter-American Development Bank
IIC	Inter-American Investment Corporation
MIF	Multilateral Investment Fund
MO	Multilateral Organization
MOPAN	Multilateral Organisation Performance Assessment Network
OECD-DAC	Organisation for Economic Co-operation and Development's Development Assistance Committee
OVE	Office of Evaluation and Oversight
PEC	Policy and Evaluation Committee
RBM	Results Based Management
SG	Sovereign Guaranteed
SPD	Strategic Planning and Development Effectiveness
SWG	Sustainability Working Group
US	United States of America

# Executive Summary

## Background

The Inter-American Development Bank (IDB) is the oldest development bank in Latin America and the Caribbean. Its mission is to reduce poverty and inequalities and to achieve sustainable growth in the region. It is the region's largest financier of development projects. In 2013, it approved US \$13.9 billion in loans, and US \$251 million in concessional financing and grants to the most vulnerable countries in the region and provided US \$1.8 billion in technical cooperation.

In 2010, the Bank launched a series of reforms to strengthen its strategic focus, development effectiveness, efficiency, and accountability for results. IDB has a strong independent evaluation function and a self-evaluation system that is promising but still being fine-tuned.

## Approach and Methodology

The review is based on a meta-synthesis of a sample of 33 IDB evaluation reports that were published between 2008 and 2013 on the website of the IDB's Office for Evaluation and Oversight (OVE), and that met established criteria. The synthesis of evaluation findings was supplemented by a review of IDB corporate documents.

## Key Findings and Conclusions

### Review of development effectiveness of the IDB

The IDB has been delivering and reporting on results each year in its Development Effectiveness Overview. It is also clearly committed to improving its development effectiveness. The following conclusions nonetheless note several areas for improvement, as they emerged from the sample of evaluation reports. Where literature review and interviews have provided evidence that such improvements have in fact commenced, these have also been noted.

**1. IDB programs are relevant to the needs of target groups and support the development plans and priorities of IDB borrowing member countries.** The IDB developed effective relationships with governments. The Bank's programs were seen as particularly relevant in countries where it applied a strategic approach that clearly identified its comparative advantage. In addition, its level of alignment with the borrowing country's development priorities and its use of appropriate tools for program implementation contributed to the relevance of the Bank's programs.

**2. For many years, the IDB lacked evidence of progress toward its stated development objectives and results; however, this is beginning to change.** The programs reviewed often did not provide evidence of progress towards their stated development objectives. This was due in part to a lack of information from systematic monitoring of project or program level results and to contextual challenges that hindered program implementation. However, where information was available, the Bank was comparatively more successful in countries where it was able to develop a clear strategic approach, a specific market niche, and a focus on a limited number of

areas in which it had comparative advantages. As further noted below, the Bank has made significant progress since 2008 in its design of projects and country programs and in the importance it gives to evaluation and learning. The retrospective nature of this review did not fully capture that growing evidence base on results.

**3. The IDB had shortcomings in project and program level planning and in monitoring and evaluation, which limited the availability of information on development effectiveness during the period covered.** The evaluations reviewed consistently pointed to problems on how Bank projects and programs identified results, defined indicators, and monitored progress, which led to poor evaluability of individual projects and country programs. The mid-term evaluation of IDB-9 suggests, however, that the introduction of the Development Effectiveness Framework in 2008 appears to be promoting development effectiveness at the project level and that progress in this area is promising.<sup>1</sup>

**4. The review did not find solid evidence of the extent to which the results of Bank-supported programs are sustainable.** Only 36% of the evaluation reports reviewed suggested that the Bank had contributed to strengthening the enabling environment for development and 40% indicated that programs and projects were sustainable in terms of institutional capacity. Sustainability seems to be hampered by a poor enabling environment in many countries. Factors limiting sustainability include a lack of recurrent cost funding mechanisms for infrastructure and service delivery projects, a lack of country ownership and political will, and weak capacity of the Bank-supported institutions.

**5. The IDB has a strong system for conducting country program evaluations, but there is limited evidence that evaluations were used to improve development effectiveness.** The IDB has a strong independent evaluation function. Country program evaluations have been carried out regularly at the IDB. However, approximately two-thirds of the evaluation reports reviewed did not include a management response or other evidence that the Bank took into account the recommendations from these evaluations. The Bank has taken recent actions in this area and in 2013 introduced a platform to record, manage, and monitor OVE's recommendations. In addition, the Bank is implementing an ambitious plan to carry out impact evaluations (more than 67 evaluations are currently underway) with the intent of using these strategically to make meaningful contributions to the development knowledge base.

**6. The IDB has made a strong commitment to gender equality in recent years, but this review found that its programs and evaluations do not yet regularly integrate gender equality as a cross-cutting theme.** The evaluation reports reviewed provided insufficient coverage of gender equality, and the absence of gender equality in IDB projects was noted in previous studies.<sup>2</sup> The IDB has begun to address this situation by introducing a Gender Equality Policy in 2010 and a Gender Action Plan that provide a clear focus on gender equality and women's empowerment as integral to development. The integration of gender equality considerations in IDB projects, country strategies, and evaluations is still in early stages.

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<sup>1</sup> Inter-American Development Bank, Office of Evaluation and Oversight, OVE, *Mid-Term Evaluation of IDB-9 Commitments*, p. xiii.

<sup>2</sup> Inter-American Development Bank, Office of Evaluation and Oversight, OVE, *¿Se está integrando la perspectiva de género en los proyectos del Banco?*, RE-373, July 2010.

**7. The Bank has an environment policy, but the sample of evaluations reviewed provided insufficient coverage of environmental sustainability to warrant presentation of results in this area.** The IDB takes a two-pronged approach to implementing its commitment to environmental sustainability: a *mainstreaming approach*, which seeks to enhance environmental and social benefits; and a *safeguards approach*, which seeks to minimize and compensate for negative impacts.<sup>3</sup> Recent reports suggest that the mainstreaming of environmental sustainability is a work in progress and that it is still not effectively integrated into the Bank's country strategies. The sample of evaluations reviewed did not report on the extent to which program and project results were environmentally sustainable.

**8. The Bank has faced challenges in managing its portfolio of projects efficiently, often due to the operating context at the country level.** Many of the evaluations noted delays in the start-up or during the implementation of IDB projects. Complex country processes (such as those required for Congressional ratification of loans), the varying capacities of executing agencies, transactional difficulties (including delays in procurement and contracting), and complexities in project design resulted in delays and additional costs in the project cycle.

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<sup>3</sup> Inter-American Development Bank, Office of Evaluation and Oversight, Mid-Term Evaluation of IDB-9 Commitments: Environmental and Social Safeguards, including Gender Policy, 2013, p. i.



# 1. Background

## 1.1 Introduction

This report presents the results of a review of the development effectiveness of the Inter-American Development Bank (IDB). The review is based on a meta-synthesis of IDB evaluation reports published between 2008 and 2013 by the IDB's Office for Evaluation and Oversight (OVE), and is supplemented with a review of IDB corporate documents.

The report is structured as follows:

- Section 1 provides an introduction to the review and a general description of the IDB as an organization;
- Section 2 presents a brief description of the approach and methodology used to carry out the review;
- Section 3 details the findings of the review in relation to six main criteria and 19 sub-criteria of effectiveness in development programming and humanitarian action; and
- Section 4 presents the conclusions of the development effectiveness review.

## 1.2 Development Effectiveness Reviews – Purpose and Approach

To date Foreign Affairs, Trade and Development Canada and the Netherlands' Ministry of Foreign Affairs have led development effectiveness reviews of seven multilateral organizations. The purpose of these reviews is to address a gap in the information available to bilateral development agencies on the development effectiveness of the multilateral organizations they support.

Although the Multilateral Organisation Performance Assessment Network (MOPAN) provides regular reports on the organizational effectiveness, progress towards results, and relevance of multilateral organizations, it has not yet fully addressed the need for *field-tested* evidence on the development effectiveness of multilateral organizations. Other approaches, such as large-scale, joint donor-funded evaluations of multilateral organizations, are time-consuming, costly, and result in significant management burdens for the organizations being evaluated.

A standard approach for assessing the development effectiveness of multilateral organisations was developed under the guidance of the Organisation for Economic Co-operation and Development's Development Assistance Committee (OECD-DAC) Network on Development Evaluation (EVALNET). It is based on a common set of assessment criteria derived from the DAC's evaluation criteria (Annex 1) to classify the findings of a sample of evaluation reports meeting established evaluation quality standards.

The methodology was pilot tested in 2010 as part of the Development Effectiveness Reviews of the Asian Development Bank and the World Health Organization. The overall approach and methodology were endorsed in June 2011 by the members of the DAC-EVALNET. It is intended to work in a coordinated way with initiatives such as the DAC-EVALNET/United Nations Evaluation Group Peer Reviews of United Nations evaluation functions. It also recognizes that

multilateral organizations continue to make improvements and strengthen their reporting on development effectiveness.

## 1.3 IDB: A regional bank promoting economic growth and poverty reduction in Latin America and the Caribbean

### 1.3.1 Overview

Established in 1959, IDB is the oldest development bank in Latin America and the Caribbean and the region's largest financier of development projects. It is composed of 48 member countries, 26 of which are borrowers. The Bank's mission is to reduce poverty and inequality, and to achieve sustainable growth in the region.

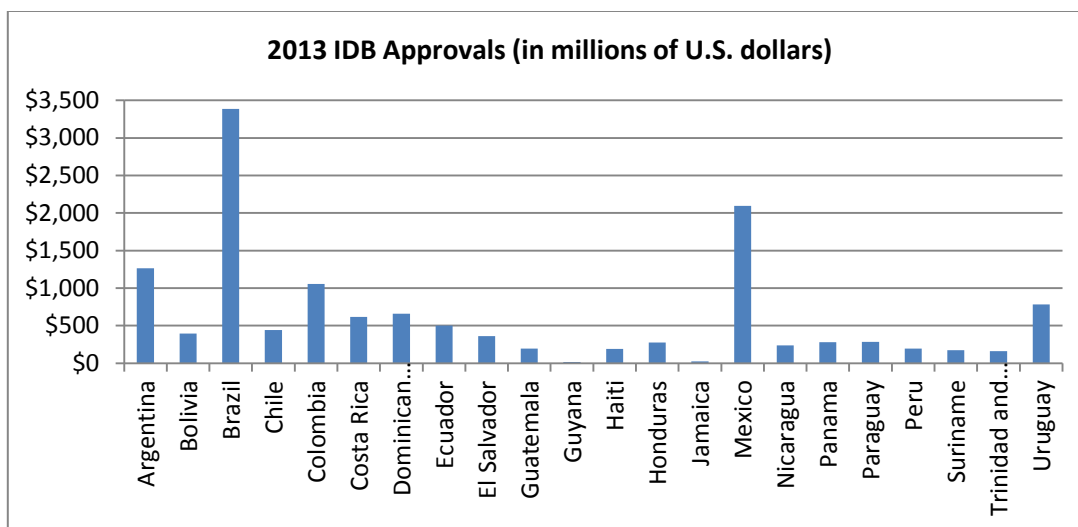
**Funding:** In 2013, the IDB approved US\$7.8 billion in sovereign guaranteed (SG) loans, US\$4 billion in policy-based loans, and US\$2.1 billion in non-sovereign guaranteed (NSG) loans to the private sector, including companies, financial institutions, and civil society organisations.<sup>4</sup> The IDB Fund for Special Operations (FSO) provides concessional financing to the most vulnerable countries in Latin America and the Caribbean (including Bolivia, Guyana, Haiti, Honduras, and Nicaragua), as well as grants to Haiti through the IDB Grant Facility. In 2013, FSO approvals totalled US\$251 million, a 69% decrease from the previous year.

The IDB also provides non-reimbursable Technical Cooperation and at the end of 2013, this portfolio consisted of 1,530 operations with an approved amount of US\$1.8 billion. In 2013, 36% of approved financing was allocated to institutional support for development, 34% to the infrastructure and environment sectors, 21% to social sector programs, and 9% to integration and trade programs. Sixty-three percent of total approved financing went to Argentina, Brazil, Mexico, Venezuela, Chile, Colombia, Peru (known as Group A and B countries).<sup>5</sup>

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<sup>4</sup> IDB. 2013 Annual Report. The Year in Review. <http://publications.iadb.org/handle/11319/6422>, Accessed on 14 April 2014.

<sup>5</sup> IDB 2013 Annual Report. The Year in Review. p.5 <http://publications.iadb.org/handle/11319/6422>, Accessed on 20 May.



**IDB Group:** The larger Inter-American Development Bank Group (IDB Group) is composed of the IDB; the Inter-American Investment Corporation (IIC), established in 1986; and the Multilateral Investment Fund (MIF), established in 1993.

The IIC promotes private sector development in Latin America and the Caribbean by providing financing to small and medium-sized enterprises in the form of equity investments, loans, and guarantees to assist companies in streamlining management processes. In 2013, the IIC approved US\$415.4 million in investments and direct loans, in addition to US\$197.5 million for syndicated loans and co-financing operations to leverage direct IIC funding.<sup>6</sup>

The MIF's mission is to promote private sector development benefitting low-income households in Latin America and the Caribbean by providing technical assistance grants, equity investments, and loans to private partners (such as civil society organisations, industry associations, foundations, universities cooperatives, companies, and financial institutions). In 2013, the MIF approved 68 projects with an overall value of US\$108.3 million.<sup>7</sup>

Although the IIC and MIF work in close collaboration with the IDB, both entities have independent strategic frameworks and reporting mechanisms.

**Reforms and priorities:** In 2010, the Board of Governors approved the *Report on the Ninth General Increase in the Resources of the Inter-American Development Bank (IDB-9)* and the *Cancun Declaration*, both of which tied IDB-9 to a series of reforms intended to strengthen the strategic focus, development effectiveness, and efficiency of the Bank to help it remain relevant

<sup>6</sup> IIC. 2013 Annual Report: Washington D.C.

<sup>7</sup> IDB. 2013 Annual Report. The Year in Review. <http://publications.iadb.org/handle/11319/6422>, Accessed on 14 April 2014.

and competitive in the years ahead.<sup>8</sup> IDB-9 proposed a corporate strategy based on five strategic priorities (subdivided into 13 thematic areas<sup>9</sup>). They are:

1. Social policy for equity and productivity;
2. Infrastructure for competitiveness and social welfare;
3. Institutions for growth and social welfare;
4. Competitive regional and global international integration; and
5. Protect the environment, respond to climate change, and enhance food security.

In addition, IDB-9 called for better accounting for results. Prior to 2010, the IDB did not have a comprehensive Corporate Results Framework (CRF) and monitoring at the corporate level was limited to tracking two lending targets.<sup>10</sup>

The IDB's Corporate Results Framework is in line with corporate results frameworks used by other development banks and is composed of four tiers:

- tier I monitors regional development objectives;
- tier II monitors the Bank's output contributions to regional goals;
- tier III monitors the Bank's lending program priorities; and
- tier IV monitors the Bank's operational effectiveness and efficiency.

Tiers I and II are structured around the Bank's five strategic priorities. IDB-9 requires that data from the Corporate Results Framework be reported on annually in the Development Effectiveness Overview (DEO).

### 1.3.2 Reporting on Development Effectiveness

In 2010, the IDB's Office of Strategic Planning and Development Effectiveness (SPD) presented its first DEO. According to the MOPAN 2011 assessment of the IDB, the DEO was a significant improvement over previous reporting mechanisms, which focused on the probability of achieving development objectives rather than on the results themselves.<sup>11</sup> However, the DEO does not assess the development effectiveness of the IIC or MIF as they have their own strategic frameworks and reporting mechanisms.<sup>12</sup>

While the IDB has made great strides in improving reporting on development effectiveness, the DEO still has limitations.

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<sup>8</sup> IDB, Office of Evaluation and Oversight, Overview Report Mid-Term Evaluation of IDB-9 Commitments, March 2013, p.iii.

<sup>9</sup> The Bank's 13 thematic sectors are: 1) safety nets for the poor; 2) labor markets; 3) education; 4) health; 5) gender and diversity; 6) basic services; 7) productive infrastructure; 8) financial services; 9) fiscal efficiency and sustainability; 10) citizens' security; 11) trade and integration; 12) environmental and climate change; and 13) food security.

<sup>10</sup> The two lending targets that were monitored throughout IDB-8 were: 1) 40% in volume and 50% in number of projects for poverty reduction and social equity; 2) 35% in volume to the poorest countries.

<sup>11</sup> MOPAN (2011) Organisational Effectiveness Assessment: Inter-American Development Bank (IDB), p. 48.

<sup>12</sup> IDB's Development Effectiveness Overview does not report on the IIC or the MIF's activities. Rather, the IIC reports on its performance through its Annual Report and the MIF reports annually through the Development Effectiveness Report.

First, it does not address all issues and criteria of interest to bilateral donors, as outlined by the OECD-DAC Network on Development Evaluation. Information on relevance, sustainability, and crosscutting themes (especially gender equality) is notably absent. Other IDB reports provide insights into the issues/criteria lacking in the DEO and may be useful supplements. These reports include background papers prepared for the mid-term evaluation of IDB-9 and annual reports on the IDB's contributions to sustainability.

Second, the DEO is not comprehensive as it does not report on 100% of the Bank's operations or address all of the indicators outlined in the Corporate Results Framework. The Office of Evaluation and Oversight (OVE) has commented on the lack of a clear methodology used in the selection of Corporate Results Framework indicators and the data reported on in the DEO.<sup>13</sup> The IDB's contribution to the 2012 Common Performance Assessment System (COMPAS) Report, a report of the members of the Multilateral Development Bank Working Group on Managing for Development Results, notes that the IDB's corporate reporting is based on a sample of projects. In 2012, this reflected monitoring data from 65 out of 156 projects in the portfolio.<sup>14</sup>

Finally, weaknesses in the Corporate Results Framework, including a lack of baseline data, and inconsistencies regarding the types of evidence used to assess development effectiveness, may affect the quality of data presented in the DEO. In addition, in reporting on the results framework, the DEO relies on self-reported project data (project completion reports) that have not always been validated by the OVE. The 2013 DEO includes two useful additions: the reporting on lessons emerging from the impact evaluations of IDB projects (10 were completed in 2013) and a novel chapter focused specifically on the failure of approaches adopted in certain sectors (such as citizen security and urban development and housing).

The IDB has now completed its fourth cycle of development effectiveness reporting. At the time of the *Mid-term Evaluation of IDB-9 Commitments* (2013), the Bank had implemented many of the IDB-9 requirements related to the Development Effectiveness Framework (DEF). The DEF provides the policy framework to improve the effectiveness of the Bank's projects and programs.<sup>15</sup> The DEF also provides a set of tools for learning and accountability for results that includes the Development Effectiveness Matrix, a Progress Monitoring Report, and a Project Completion Report. The implementation of all of the components of the DEF is crucial for addressing weaknesses in the DEO. However, implementation of this framework has been uneven.

- While its Development Effectiveness Matrix<sup>16</sup> had been successfully rolled out for Sovereign Guarantee (SG) operations<sup>17</sup>, the Development Effectiveness Matrix for Non-Sovereign Guarantee (NSG) operations<sup>18</sup> was still a work in progress.

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<sup>13</sup> OVE (2013) Corporate Results Framework, Background paper to the Mid-term Evaluation of IDB-9 Commitments: Washington D.C.

<sup>14</sup> COMPAS Indicators 2012: Reporting by Multilateral Development Banks, p. 35.

<sup>15</sup> The DEF covers all IDB products: sovereign guaranteed operations, non-sovereign guaranteed operations, country strategies and knowledge and capacity building.

<sup>16</sup> The Development Effectiveness Matrix is a checklist of analytical and informational requirements used to assess the evaluability of projects or programs at the time that they are approved.

<sup>17</sup> i.e. loans to borrowing member countries for development projects.

<sup>18</sup> i.e. loans to private sector, sub-national governments, public-private initiatives.

- On the other hand, the Progress Monitoring Report for SG projects had been fully implemented and was being revised to address challenges identified in the first stage of its implementation.
- At the time of the Mid-term Evaluation of IDB-9 Commitments (2013), the Bank was about to launch its new Project Completion Report, which would enhance the Bank's records of project accomplishments.<sup>19</sup>

### 1.3.3 Evaluation at the IDB

The evaluation function at the IDB was established in the late 1960s and has gone through several reforms to address issues of independence and quality, among others. In 1999, with resolution RE-238 *Strengthening Oversight and Rebuilding Evaluation in the Bank*, the Office of Evaluation and Oversight (OVE) was established as an independent body mandated to evaluate the Bank's programs and systems. Since 1999, several efforts had been made to create a functioning self-evaluation system, which was eventually established in 2008 through the Development Effectiveness Framework.<sup>20</sup>

Evaluation at the Bank is a responsibility shared between Bank management, the OVE, and the Board of Executive Directors.

Management oversees the self-evaluation system and focuses on project evaluations and monitoring portfolio performance. Within management, the Office of Strategic Planning and Development Effectiveness (SPD) is responsible for ensuring that IDB's actions are guided by the "achievement of results and an efficient management of risks."<sup>21</sup> In this capacity, it has an important role in providing guidance for the application of the DEF and strengthening the internal processes for monitoring and evaluation.

The OVE is structurally and operationally independent from management. It reports directly to the Board of Executive Directors through the Policy and Evaluation Committee (PEC). It also supports the evaluation efforts of the IIC and MIF on a contract basis. The Office assesses whether the IDB's strategies, policies, and programs comply with the Bank's objectives and is mandated to undertake:

- oversight functions;
- country program evaluations;
- sector, thematic, and ex-post evaluations;
- policy and instrument evaluations; and
- evaluation capacity development.

<sup>19</sup> IDB, Office of Evaluation and Oversight, Overview Report Mid-Term Evaluation of IDB-9 Commitments, March 2013, p. 32.

<sup>20</sup> According to the OECD-DAC, self-evaluation is defined as "an evaluation by those who are entrusted with the design and delivery of a development intervention." This means that managers at the IDB have to carry out self-evaluation of their corresponding products (loans, country programs). The Development Effectiveness Framework provides tools that enable managers to fulfill this internal monitoring and evaluation function.

<sup>21</sup> Inter-American Development Bank, Office of Evaluation and Oversight, Strengthening Evaluation to Improve Development Results, 2011, p. 27.

OVE develops an annual work program and budget for planned evaluations in the coming year, and an indicative list of evaluations for the following year.<sup>22</sup> The OVE has established a cycle of country program evaluations (CPE) that provides full coverage of country programs. The main documents governing OVE's role and activities are its founding document (Strengthening Oversight and Rebuilding Evaluation in the Bank – RE-238, 1999), the draft terms of reference for the Director of OVE (RE-366-11, 2011), and the protocol for the review and consideration of evaluations in the Administrative Manual (AM 140-1).

The Board of Executive Directors reviews relevant findings and recommendations arising from evaluations of the Bank's country programs, strategies, policies, operations, and institutional processes.

Strengthening the IDB's evaluation function has been an ongoing process. An external review was carried out by an independent panel in 2011. The aim was to strengthen the evaluation function in order to achieve greater development effectiveness. The review found that IDB had made substantial progress in evaluation since 1999, that its evaluation systems were more comprehensive, and that the function had good practice standards.<sup>23</sup> It also found, however, that the evaluation function's effectiveness was limited by a lack of collaboration and integration among the parties involved in evaluation.<sup>24</sup>

The review noted that the self-evaluation function experienced early success with the implementation of the DEF, but that it was still facing challenges. With regard to the independent evaluation function, the review noted that OVE had produced a large number of quality reports but that it needed to improve the effectiveness, use and influence of independent evaluation, and reduce the isolation that had emerged as a result of its interpretation of independence.<sup>25</sup>

Recommendations were provided to strengthen effectiveness of the evaluation system:

- Build a more collaborative learning environment that reduces tensions and fosters a learning culture.
- Increase the use of independent evaluation products and reform OVE's culture of isolation.
- Fully implement self-evaluation and increase its use through an effective change management strategy and by providing the needed resources.
- Strengthen Board oversight of the evaluation system by empowering the Policy and Evaluation Committee to act as necessary to provide leadership during a period of change.
- Increase client country involvement in the evaluation process.
- Formulate a new evaluation policy that consolidates IDB's approaches, addresses new realities, and reflects the findings of the review.

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<sup>22</sup> Inter-American Development Bank, Office of Evaluation and Oversight, OVE Work Program 2013-2014, December 2012.

<sup>23</sup> Good practice standards are those set forth by the Organisation for Economic Co-operation and Development (OECD) and Multilateral Development Bank's Evaluation Cooperation Group (ECG). IDB, Strengthening Evaluation to Improve Development Results: Report of the Independent Review Panel on Evaluation at the Inter-American Development Bank (2011), p. xiii.

<sup>24</sup> IDB, Strengthening Evaluation to Improve Development Results: Report of the Independent Review Panel on Evaluation at the Inter-American Development Bank (2011), p. xiii.

<sup>25</sup> IDB, Strengthening Evaluation to Improve Development Results: Report of the Independent Review Panel on Evaluation at the Inter-American Development Bank (2011), p. xiv.

OVE's work program (2013-2014) reflects the efforts it has made to respond to the findings and recommendations of the 2011 review. For example, it has made efforts to change the product mix; work with management to develop a new protocol for the handling of evaluations; developed approach papers for all evaluations (which are shared with management for comment); and developed a system for tracking evaluation recommendations.<sup>26</sup> The formulation of a new evaluation policy was one of the few recommendations that were not acted upon, and the Bank has not prepared a consolidated evaluation policy.

In sum, the IDB has a strong independent evaluation function, and a self-evaluation system that is promising, yet still being fine-tuned. As a result of the Independent Panel report, several improvements have been made in the evaluation architecture of the IDB. However, the sample for this review only includes evaluations published from 2008 to 2013. As such, the results from these efforts are not yet evident in the findings of the review.

## 2. Methodology

### 2.1 Overview

This section describes the methodology used in the Development Effectiveness Review of the IDB, including the universe of evaluations, sampling method, review criteria, review and analysis processes, and a discussion of other data collection methods. The section concludes with a discussion of the review's limitations.

### 2.2 Evaluation Universe and Sample

Beginning with IDB evaluation reports available on the website of the Office of Evaluation and Oversight (OVE), a universe of 94 evaluation reports (the Review universe) was constructed. The process of finalizing the list involved several discussions and exchanges with the OVE and management units within the IDB.

As part of the preliminary review, the review team screened the evaluation reports by applying the criteria outlined in the DAC-EVALNET Evaluation Quality Screening Scoring Guide (further explained in Annexes 3 and 4).

The objective of the preliminary review was to determine which of the following scenarios would apply to the universe of evaluation reports and, subsequently, what steps should be taken to assess IDB development effectiveness given the available information.

- Scenario A: The multilateral organization's own reporting on the development effectiveness criteria is rigorous and evidence-based, covering a large proportion of its investments and therefore the reporting may be relied upon by its bilateral shareholders to assess the organization's development effectiveness.
- Scenario B: The multilateral organization's reporting on development effectiveness is not sufficient, but the organization has an evaluation function that produces an adequate body of

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<sup>26</sup> A broader list of the steps taken to date is provided in IDB, OVE, Work Program 2013-2014.



reliable and credible information that can be used to synthesize the organization's performance on the development effectiveness criteria.

- Scenario C: The multilateral organization's reporting on development effectiveness criteria is inadequate, and the body of evaluation information available from evaluations is either not adequate or is not credible or reliable to allow for a synthesis of the organization's performance on the development effectiveness criteria.

The preliminary review excluded 42 of the 94 reports (45%) that did not meet necessary criteria in the DAC-Evaluation Quality Screening Guide (i.e. they did not achieved a minimum score for the criteria listed in Annex 4). It identified 52 reports (i.e. 55%) that met the criteria and were therefore considered suitable for inclusion in the meta-synthesis.<sup>27</sup>

Subsequently, 19 of these 52 reports were also screened out – 12 were corporate evaluations (focused more on corporate business processes than results, relevance or sustainability of programs on the ground) that did not report on any of the six common development effectiveness assessment criteria,<sup>28</sup> and five were project and impact evaluations that were narrow in scope and did not always specify the IDB's role.

Based on the preliminary review, Scenario B was applied to the IDB. The final sample consisted of 33 evaluation reports (see Annex 2). The key characteristics of the sample are described below:

- **Geographic Coverage:** The evaluation sample covers the majority of IDB's borrowing member countries, including the five borrowing member countries receiving the highest levels of loan and guarantee approvals from the IDB during the period 2008-2013 (i.e. Argentina, Brazil, Mexico, Colombia, and Peru). The sample also includes countries from each of the Bank's four country groupings, based on their relative level of development.<sup>29</sup>
- **Coverage of the Bank's concessional financing mechanisms:** The sample includes evaluation reports from countries in the region receiving concessional financing from the IDB's Fund for Special Operations (including Bolivia, Guatemala, Guyana, Haiti, Honduras, Nicaragua, and Paraguay) as well as grants through the IDB Grant Facility (in the case of Haiti).

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<sup>27</sup> The 52 evaluation reports met the two quality thresholds ensuring that "the findings and conclusions of the evaluation can be relied on as a reasonable guide to the development effectiveness of that element of MO [Multilateral Organization] programming which is covered by the evaluation report under review." OECD DAC Network on Development Effectiveness. Assessing the Development Effectiveness of Multilateral Organizations: Guidance on the Methodology Approach. Revised June 2012; page 18.

<sup>28</sup> The six criteria are: achievement of development objectives and expected results; cross-cutting themes (environmental sustainability and gender equality); sustainability of results/benefits; relevance of interventions; efficiency; and using evaluation and monitoring to improve development effectiveness.

<sup>29</sup> The sample covered four countries from Group A which includes the region's more advanced economies (Argentina, Brazil, Mexico, and Venezuela); three countries from Group B including middle developing countries (Chile, Colombia, and Peru); eight countries from Group C which includes countries with insufficient markets (the Bahamas, Barbados, Costa Rica, Jamaica, Panama, Suriname, Trinidad and Tobago, and Uruguay); and finally eleven countries from Group D including the least-developed countries (Belize, Bolivia, Dominican Republic, Ecuador, El Salvador, Guatemala, Guyana, Haiti, Honduras, Nicaragua, and Paraguay). Source: <http://www.iadb.org/en/about-us/loans-in-foreign-exchange,6244.html>.

- **Broad Representation of IDB Operations (volume and type):** The evaluation sample represents an important proportion (94%) of the IDB's loan and guarantee approvals in the period 2007-2010.<sup>30</sup> In addition, the sample includes the most recent evaluation of the Multilateral Investment Fund, which approved 76 projects with an overall value of US \$93.4 million in 2012.<sup>31</sup> Given the emphasis on Country Program Evaluations, the sample included performance information on different types of Bank products, including policy-based loans, lines of credit, investment loans, and technical cooperation, among others.
- **Coverage of Development Effectiveness Criteria:** The sampled reports all addressed development effectiveness criteria, although the extent to which individual criteria and sub-criteria were covered varied from one evaluation report to another.
- **Timeframe:** All reports in the evaluation sample were published between 2008 and 2013 and most focused on programming carried out between 2000 and 2010. Consequently, neither the universe of 94 evaluation reports nor the sample of 33 reports provide many insights into the results of IDB operations following its commitments outlined in IDB-9.

## 2.3 Criteria

The methodology used in this review does not rely on a particular definition of development or humanitarian effectiveness. Instead, it focuses on the following essential characteristics of effective multilateral organization programming derived from DAC evaluation criteria:

- Programming activities and outputs would be relevant to the needs of the target group and its members;
- Programming would contribute to the achievement of development objectives and expected development results at the national and local level;
- The benefits experienced by target group members and the development (and humanitarian) results achieved would be sustainable in the future;
- Programming would be delivered in a cost efficient manner;
- Programming would be inclusive, i.e. it would support gender equality and environmental sustainability, thereby not compromising future development prospects;
- Programming would enable effective development by allowing participating and supporting organizations to learn from experience and use performance management and accountability tools, such as evaluation and monitoring, to improve effectiveness over time.

### Highlight Box 1: Development Effectiveness Assessment Criteria

1. The Achievement of Development and Humanitarian Objectives and Expected Results
2. Cross Cutting Themes (Environmental Sustainability and Gender Equality)

<sup>30</sup> This percentage was calculated based on figures on approved loans and guarantees provided in the IDB's annual reports from 2007 to 2010.

<sup>31</sup> It is not possible to know the exact composition of the sample with regard to sovereign versus non-sovereign guarantee operations, strategic priorities, sector, or other characteristics.

3. Sustainability of Results/Benefits
4. Relevance of Interventions
5. Efficiency
6. Using Evaluation and Monitoring to Improve Humanitarian and Development Effectiveness

The methodology, therefore, involves a systematic and structured review of the findings of IDB evaluations as they relate to the six main criteria and 19 sub-criteria considered essential elements of effective development and humanitarian programming (Annex 1).

## 2.4 Review Process and Data Analysis

The review team consisted of two members. Each reviewed a set of evaluations and, based on information in the evaluations and the standard review grid (Annex 4), provided a rating on each sub-criterion.<sup>32</sup> Team members substantiated their ratings by providing evidence from the evaluations.

Efforts were made to ensure consistency in ratings (inter-rater reliability): an initial session was held during which team members reviewed and compared their ratings for the same evaluation report. A second session, held at the mid-point of the review process, addressed any issues facing reviewers. Upon completion of the reviews and documentation of qualitative evidence to support reviewers' ratings, the team leader examined all ratings to ensure that sufficient evidence was provided, that the available evidence was consistent with the ratings, and to identify the factors contributing to or detracting from the achievement of the criteria outlined by the DAC.

## 2.5 Other Data Collection

The review of IDB evaluation reports to inform the meta-synthesis was supplemented by a review of IDB corporate documents and evaluations. In particular, the 2013 background papers prepared by the OVE as part of the mid-term review of IDB-9 were important sources of information (See Annex 6).

## 2.6 Limitations

This review took place during a period of change at the IDB; the Bank is implementing a series of reforms aimed at increasing its effectiveness. In this context, there were several limitations to the Development Effectiveness Review.

- **Retrospective Nature:** The sample of evaluations used in this review covered IDB operational work dating from the late 1990s to 2012 (approximately) and are retrospective. The meta-synthesis may, therefore, identify challenges to development effectiveness that have already been partially or fully addressed by the IDB, particularly as a result of implementing its commitments under IDB-9. To the extent possible, the evaluation team integrated information

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<sup>32</sup> For each report, a rating of Highly Satisfactory, Satisfactory, Unsatisfactory, or Highly Unsatisfactory was provided on each sub-criterion.

from relevant IDB-9 mid-term review studies (published in 2013) to provide more time-sensitive findings and conclusions.

- **Sample Composition:** As most of the evaluations included in the sample were Country Program Evaluations (CPE), the analysis could draw on country-level evidence (which is key when considering the development effectiveness of multilateral organizations). However, the sample did not represent a broad set of sector/thematic and corporate studies.<sup>33</sup> While CPEs cover a diversity of programming in-country, they do not always make an overall judgment or statement about the achievement of objectives at the country level. Where the CPEs did not provide this overall judgment, the reviewers compiled evidence from each of the objective areas to make their own assessments.
- **Data Availability:** As noted above, there were relatively few sector or thematic evaluations in the universe of available documents and, therefore, in the sample of evaluations reviewed. Sector/thematic studies provide information about the Bank's work in multiple countries and are therefore useful in strengthening the understanding of the Bank's work in a particular subject area (for example, water and sanitation, energy, education, etc.)
- **Inability to Provide an Analysis in Relation to the IDB's Strategic Priorities:** As noted above, the IDB-9 articulated five strategic priorities for the IDB. Although country programs have pillars that may mirror these priorities, the programs were designed prior to IDB-9 and were tailored to the demands of each client country. Therefore, it was not possible to aggregate and analyze data in a way that could provide an assessment of how the IDB is performing in each of these strategic priority areas.

## 3. Findings on the Development Effectiveness of IDB

### 3.1 Overview

This section presents the results of the review as they relate to the six major criteria and associated sub-criteria (Annex 1). Each section includes:

- Coverage: An analysis of coverage based on the number of evaluations in the sample of 33 that addressed the six major criteria and their associated sub-criteria.
- Key findings of the review, including quantitative data on the distribution of ratings (ranging from highly satisfactory to highly unsatisfactory) on each sub-criterion as reported in the evaluations reviewed.<sup>34</sup>

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<sup>33</sup> Although the universe of 94 evaluation reports identified included many corporate studies, most of them did not address the development effectiveness criteria. Many of the recent evaluation reports were prepared for the mid-term review of IDB-9. These reports focused on the implementation of IDB's commitments (mostly in terms of adjusting policy, strategy, and operational approaches) in the context of the ninth general capital increase, rather than development effects on the ground.

<sup>34</sup> The assessment team used a review grid (Annex 4) to classify each report's findings as Highly Satisfactory, Satisfactory, Unsatisfactory, or Highly Unsatisfactory. The review grid also included an option to indicating if a criterion was "not addressed" in the evaluation report. These results were aggregated across the reports in the sample.

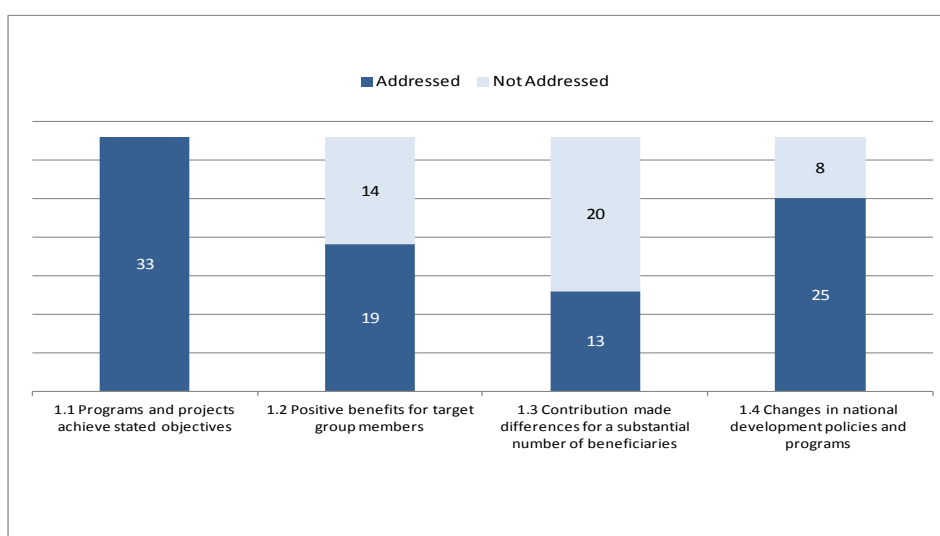
- Contributing factors: A qualitative analysis of factors that affected IDB’s results achievement on the different criteria. The figures presented refer to the frequency with which analysts in the review team found that these factors were reported across all reviewed evaluations. While these present an overall picture of the relative importance of these factors, they should not be considered an exhaustive census of the contributing/detracting factors.

## 3.2 Objectives achievement

### 3.2.1 Coverage

In the evaluation reports reviewed, the coverage of the sub-criteria related to objectives achievement was mixed. While the coverage was high for sub-criterion 1.1 on objectives achievement and for sub-criterion 1.4 on positive changes in national policies and programs, it was moderate for sub-criterion 1.2 on the benefits for target group members, and weak for sub-criterion 1.3 on program results reaching substantial numbers of beneficiaries.

Figure 3.1 Objectives achievement - number of evaluations that addressed sub-criteria (n=33)<sup>35</sup>



The lower levels of coverage for sub-criteria 1.2 and 1.3 can be largely explained by the limited availability of data on results achieved by programs supported by the Bank (most reports indicated lack of monitoring and evaluation (M&E) data to assess program effectiveness). If the review team did not find sufficient evidence of benefits or contributions to long-term impacts, it was noted as “not reported” in the review grid.

### 3.2.2 Findings

Of evaluations that addressed objectives achievement (sub-criterion 1.1), the majority (63%) indicated that IDB programs and projects were unable to fully achieve their stated development

<sup>35</sup> n = the number of evaluations in the sample.

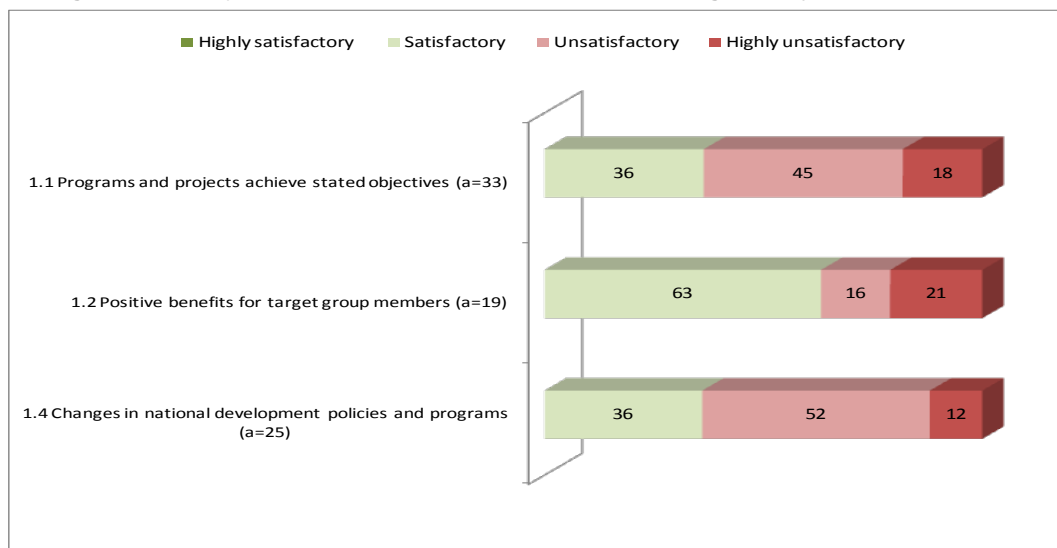
objectives, primarily due to contextual issues (political and economic environment) and/or insufficient data to demonstrate that objectives and results were achieved.

Results were more positive for the extent to which programs provided positive benefits for their target groups (sub-criterion 1.2). Of the evaluations that included data in this area, almost two-thirds (63%) reported that programs contributed to benefits for the target population.

There was insufficient coverage of contributions to making substantial differences for beneficiaries and contributing to national development goals to warrant presentation of results on sub-criterion 1.3.

Results were less positive for changes in national policies and programs (sub-criterion 1.4); in 64% of the evaluation reports reviewed there was limited evidence that the Bank’s programs had contributed to substantial policy change.

**Figure 3.2 Objectives achievement - distribution of ratings (%) by sub-criteria<sup>36</sup>**



### 3.2.3 Contributing factors

Evaluations pointed to the following factors influencing the success of country programs in meeting their stated objectives:

- The Bank was comparatively more successful in countries where it had been able to develop a clear strategic approach, a specific market niche, and a focus on a limited number of areas in which it was seen to have comparative advantages (10 of the 33 reports reviewed). For example, in Nicaragua the Bank was seen to have comparative advantages in transportation, energy, agriculture, health, and water.<sup>37</sup>
- The Bank’s partnership behaviour played an important role in the achievement of stated objectives (11 evaluations). For example, its level of contribution to policy dialogue, its

<sup>36</sup> “a” indicates the number of evaluations reviewed that addressed a sub-criterion. In some cases the percentages may not add up to 100% due to rounding.

<sup>37</sup> See CPE Nicaragua, 2008-2012.

communication practices, and its level of flexibility in terms of realigning program goals and resources when needed were noted in particular.

- Bank loans were more successful in countries where they were implemented by executing agencies that were more professional and more specialized than average (5 evaluations).

### **Highlight Box 2: A focused strategic approach in Guyana**

“The Bank’s loan portfolio was highly focused, with 86% of the volume of approvals concentrated in three sectors: transport, housing, and water and sanitation. Consistency of themes between the past and present strategies also enabled the Bank to support a progressive program of second- and third-generation operations in the infrastructure and social pillars.”

*Guyana Country Program Evaluation, 2008-2012, p.*

Evaluations also highlighted the following factors that limited the achievement of objectives:

- Projects and programs supported by the Bank had very weak monitoring and evaluation capacity and the overall level of project and program evaluability was low (21 evaluations). Consequently, most evaluation reports concluded that it was difficult, if not impossible, to measure the effectiveness of the Bank’s country level work due to factors such as lack of baseline data, lack of ex-post evaluations, inappropriate or weak project outcome indicators and/or targets, as well as imprecise and weakly defined development objectives. This issue was particularly pronounced in relation to the Bank’s Technical Cooperation work for which none of the evaluation reports were able to identify any meaningful outcomes or impact. The weakness in monitoring and evaluation systems made it very difficult for the Bank to demonstrate results.

### **Highlight Box 3: Lack of data preventing demonstration of results in Venezuela**

“The evaluation attempted to use the Bank’s tracking data and studies, but these proved insufficient to reflect progress toward the development objectives proposed for the country. As the first CPE for Venezuela, there were also no prior OVE recommendations on which progress could be reported. Consequently, the CPE had to reconstruct changes over time in the development indicators (based on official and supplemental sources, such as the Economic Commission for Latin America and the Caribbean), as well as objective evidence on the working relationship between the Bank and the country.”

*Venezuela Country Program Evaluation, 1999-2007, p. 3.*

- The Bank’s lack of clear strategic approach, combined with weaknesses in program and project design, negatively influenced the achievement of objectives (16 evaluations). In particular, evaluations noted limitations in the Bank’s capacity to develop a strategic approach in country strategies and a clear market niche. In some evaluations, the Bank was perceived as being more reactive than proactive. Other evaluations noted that the Bank developed a wide range of generic proposals for intervention in multiple sectors, without considering its comparative advantages. The importance of developing a clear strategic approach and building on comparative advantages was confirmed in a Background Paper on Country

Programming produced by the OVE in 2013. The report concluded that the Bank's Country Strategies rarely articulate a strategic approach for the Bank in key sectors or fully explore the Bank's comparative advantages.<sup>38</sup>

- Challenging political contexts and a lack of political interest and country ownership of Bank-supported development projects and programs were limiting factors (13 evaluations). In many cases, these problems were further exacerbated by significant delays in project approval and a lack of interest on the part of subsequent borrowing member administrations. In particular, 8 evaluations noted that complex and ineffective national political processes prevented congressional approval of proposed projects, thus limiting the number of loans executed. While these external factors are difficult for the Bank to address, they seem to constitute an important limitation for the effectiveness of Bank operations in certain countries.
- Institutional weaknesses (or capacity issues) and lack of experience on the part of executing units limited the achievement of objectives (6 evaluations).

#### **Highlight Box 4: Political context influencing project effectiveness in Bolivia**

"The evaluation revealed that projects exposed to changes in the political environment had serious repercussions on their performance. The numerous cases of project implementation slippages and cancelled components may have been related mainly to restructurings of government departments or units, reorganizations of executing agencies, and the emergence of new government priorities."

*Bolivia Country Program Evaluation, 2008-2012, p. 28.*

## **3.3 Cross-Cutting Themes**

### **3.3.1 Coverage**

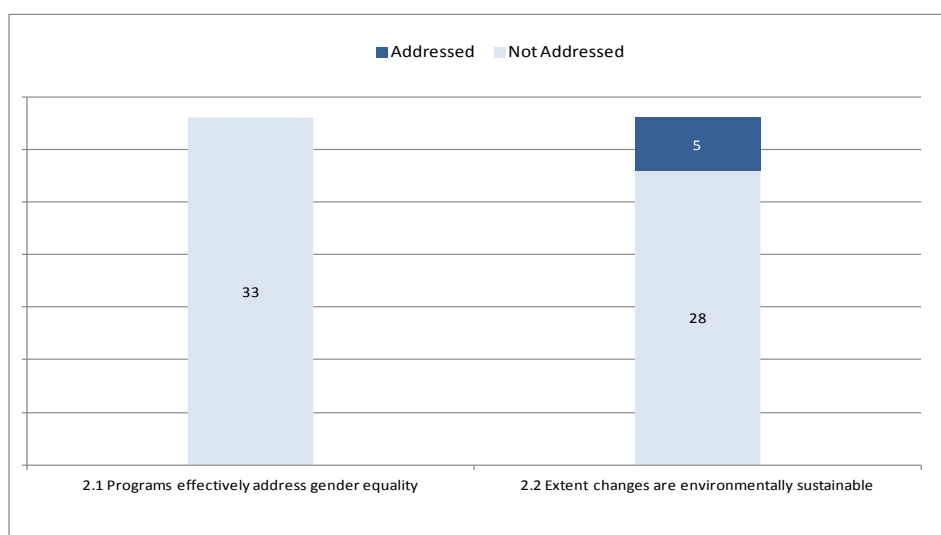
None of the evaluations reviewed analyzed the extent to which IDB-supported activities address gender equality and only five evaluations assessed the extent to which changes caused by IDB-supported projects are environmentally sustainable.

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<sup>38</sup> Mid-term Evaluation of IDB-9 Commitments, Country Programming, Background Paper, IDB, March 2013.



**Figure 3.3 Cross-cutting themes - number of evaluations that addressed sub-criteria (n=33)**



### 3.3.2 Findings

The evaluations reviewed did not provide sufficient information on either gender equality or environmental sustainability for the review team to make assessments.

It is important to note that the inclusion of evaluation criteria related to gender equality and environmental sustainability are not mandatory in the IDB's Protocol for Country Program Evaluation. Rather, both gender equality and environmental sustainability are included as possible sub-criteria under "impacts" from which evaluators may draw.

#### Progress and challenges in gender equality and mainstreaming

As part of its IDB-9 mandate, the Bank adopted a Gender Equality Policy in 2010 and a Gender Action Plan to address concerns raised by the Independent Advisory Group (IAG) established in 2009.<sup>39</sup> According to the Office of Evaluation and Oversight (OVE)'s Mid-term Evaluation of IDB-9 Commitments,<sup>40</sup> the implementation of the Gender Action Plan is progressing well in most areas, although not all IAG recommendations have been fully implemented.

The Bank is working on a number of initiatives in this area, including the preparation of country gender policy and sector notes to supplement Country Strategies. The focus of these notes has varied from multi-sector or cross-cutting overviews to more focused analyses of gender issues in targeted areas comprising the core of IDB discussions within borrowing member countries. However, according to the review, there are variations in the extent to which these notes have influenced the content of Country Strategies.

<sup>39</sup> In 2009, the Bank established an Independent Advisory Group (IAG) to review progress in implementing the Environment and Safeguards Compliance Policy to provide advice on potential improvements to the policy and its application.

<sup>40</sup> Inter-American Development Bank, Office of Evaluation and Oversight, Mid-term Evaluation of IDB-9 Commitments; Background Paper on Environmental and Social Safeguards, including Gender Policy, IDB, March 2013.

Other initiatives have included learning events for IDB staff and a pilot implementation of the gender safeguards launched in 2011-2012. At the time of the OVE mid-term evaluation (March 2013), about 140 projects had been screened for potential gender risks, and mitigation plans for seven projects had been completed and integrated into Environmental and Social Management Plans (ESMPs). The Bank has also conducted a number of social assessments that include a gender focus.

In spite of progress in the area of gender equality and mainstreaming, the OVE Mid-term Evaluation concluded that the mainstreaming of gender considerations remains a work in progress and that the Bank still lacks of a clear longer-term agenda for achieving this objective. The OVE mid-term evaluation did suggest that mainstreaming of gender in projects was increasing, with 19% of lending operations approved in the first three quarters of 2012 including a gender mainstreaming indicator in their results matrices. This was an increase from 9% in 2011. The OVE found, however, that the relevance and quality of gender indicators was uneven across results frameworks.<sup>41</sup>

### **Contributions to environmental sustainability**

In 1979, the IDB became the first multilateral development bank to adopt an environment policy, which mandated that the organization support environmental projects and ensure the environmental quality of its operations. Since then, the policy has been updated several times, and in 2006 the Bank adopted its Environmental and Safeguards Compliance Policy, which takes a two-pronged *mainstreaming* and *safeguards* approach to implementing its commitment to environmental sustainability. The approach seeks to enhance environmental and social benefits and avoid, minimize, and compensate for negative impacts.<sup>42</sup>

In 2009, the Bank established an Independent Advisory Group (IAG) to review progress on implementing the policy and to provide advice on potential improvements. The IAG's final report, presented to management in February 2011, suggested that the mainstreaming of environmental sustainability had improved, but that there were still significant challenges ahead. The mainstreaming policy had not received adequate priority and leadership and the "the Bank lacked a framework to ensure effective mainstreaming of sustainability concerns into its Country Strategies and operations."<sup>43</sup> The Bank had however made some progress in implementing the commitments outlined in the 2006 policy. As a response to the Group's recommendations, management created an internal Sustainability Working Group (SWG) with the mandate to develop an action plan structured around mainstreaming and safeguards.

According to the Mid-term Evaluation of IDB-9 Commitments, the Bank has prepared sector notes as inputs to several Country Strategies, but has not yet found an effective way to integrate environmental sustainability into its country programs and still lacks an overarching framework to guide mainstreaming.

Since 2005, the IDB has produced the annual Sustainability Report, a self-assessment that covers its annual progress and performance in relation to social and environmental sustainability.

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<sup>41</sup> Inter-American Development Bank, Office of Evaluation and Oversight, Mid-Term Evaluation of IDB-9 Commitments: Environmental and Social Safeguards, including Gender Policy, 2013, p. iii.

<sup>42</sup> Ibid, p. i.

<sup>43</sup> Independent Advisory Group on Sustainability – Final Report to the Inter-American Development Bank, Washington DC, January 2011, p 13; p. 20.

Although the report does not provide an independent review of the Bank’s performance in these areas, it gives a general overview of the Bank’s work in relation to environmental and social sustainability and highlights some of the most important environmental issues in the region.

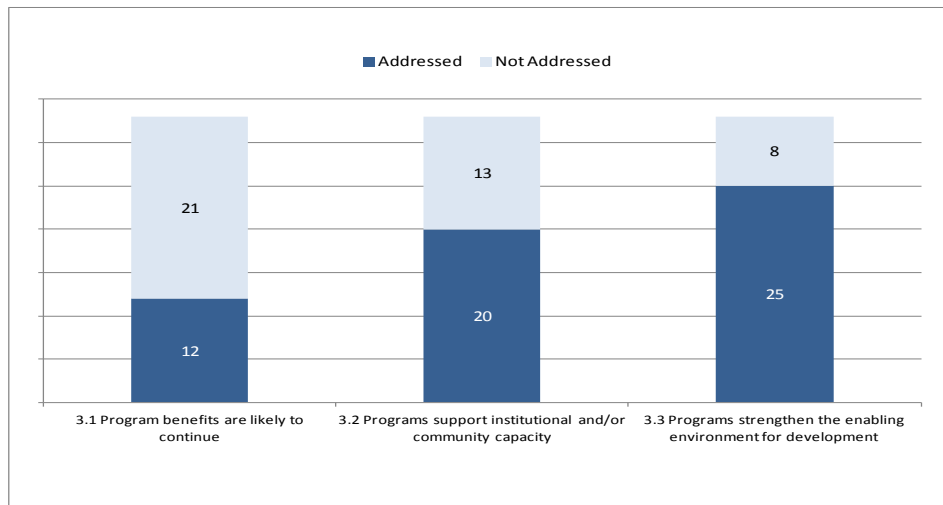
### 3.4 Sustainability

#### 3.4.1 Coverage

The coverage of sub-criteria related to sustainability varied in the sample of evaluation reports. Sub-criterion 3.1, “benefits continuing after program completion,” was covered by only 12 evaluation reports, while sub-criterion 3.2, “extent multilateral organization supported projects and programs are reported as sustainable,” was addressed by 20 evaluation reports. Sub-criterion 3.3, “Strengthening the enabling environment,” was addressed by 25 evaluation reports.

Program sustainability is one of the mandatory assessment criteria according to the IDB’s Protocol for Country Program Evaluation (CPE) 2008.<sup>44</sup> However, most evaluation reports commented on sustainability issues for only one or two projects, which made it difficult for the review team to make overall judgements about the sustainability of IDB programming. In these cases, the review team categorized the sub-criteria as “not addressed” in its review grid.

**Figure 3.4 Sustainability - number of evaluations that addressed sub-criteria (n=33)**



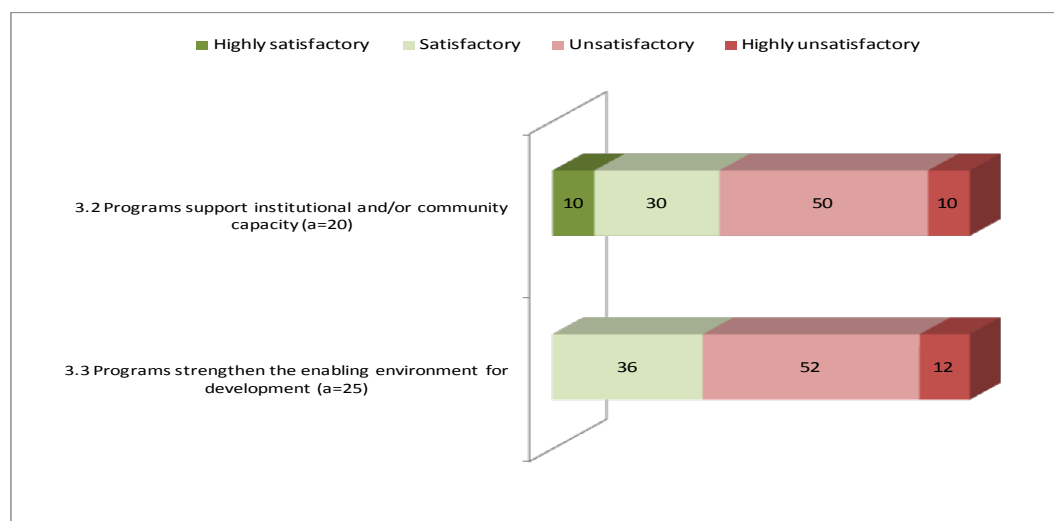
#### 3.4.2 Findings

Overall, the results with regard to sustainability were mixed. In the sample of evaluation reports reviewed that addressed sub-criterion 3.2, 40% indicated that projects and programs are sustainable in terms of institutional and/or community capacity. Among the reports that addressed sub-criterion 3.3, 36% indicated development programming contributed to strengthening the enabling environment. The reports sampled provided little or no information on sub-criterion 3.1

<sup>44</sup> Protocol for Country Program Evaluation (CPE) 2008, Office of Evaluation and Supervision, IDB, Washington DC, November 2008.

(the likelihood of benefits continuing in the post-program period); therefore review team did not have enough information to make an assessment.

**Figure 3.5 Sustainability - distribution of ratings (%) by sub-criteria<sup>45</sup>**



### 3.4.3 Contributing factors

Reviewers found relatively few explicit references to factors that had positively contributed to the sustainability of IDB-supported projects and programs. Institutional capacity and political ownership were sometimes cited. The Country Program Evaluation (CPE) for Ecuador, for example, noted that: “The Bank’s successful experience with Ecuador’s Internal Revenue Service suggests that when there is political will within an institution - as appears to be the case in SENPLADES<sup>46</sup> - very successful and sustainable institution-strengthening outcomes can be delivered.”<sup>47</sup>

The reports reviewed noted the following factors limiting sustainability:

- The lack of recurrent funding mechanisms for infrastructure and service delivery projects was a limiting factor (6 evaluations). Several CPEs noted that road projects, in particular, suffered from insufficient funding and institutional capacity to ensure that both periodic and routine maintenance was carried out.
- The lack of country ownership and political will was noted as a limiting factor (5 evaluations). Examples include lack of government approval for road maintenance funds and changing government priorities due to long delays in authorization and execution of projects.

<sup>45</sup> “a” indicates the number of evaluations reviewed that addressed a sub-criterion. In some cases the percentages may not add up to 100% due to rounding.

<sup>46</sup> Secretaría Nacional de Planificación y Desarrollo (National Secretariat for Planning and Development).

<sup>47</sup> Inter-American Development Bank, Office of Evaluation and Oversight, Country Program Evaluation Ecuador, 2000-2006, p. 42.

- The Bank did not sufficiently focus on institutional strengthening (5 evaluations) and in some cases, its programs had been too scattered; activities spread over a wide range of host institutions further limiting the potential for strengthening critically important institutions.<sup>48</sup>
- Weak capacity of local and state institutions (4 evaluations, most notably the CPE for Haiti 2007-2011).

### Highlight Box 5: Sustainability issues in Paraguay

“The road maintenance and institutional management objectives sought for this sector were not delivered. The limited maintenance budget line – enough for only 20% of maintenance needs – is a constraint for the sector’s sustainability. On the institutional management side, during the review period the Ministry of Public Works and Communications expended, on average, only 60% of its budget and had serious administrative and technical management issues.”

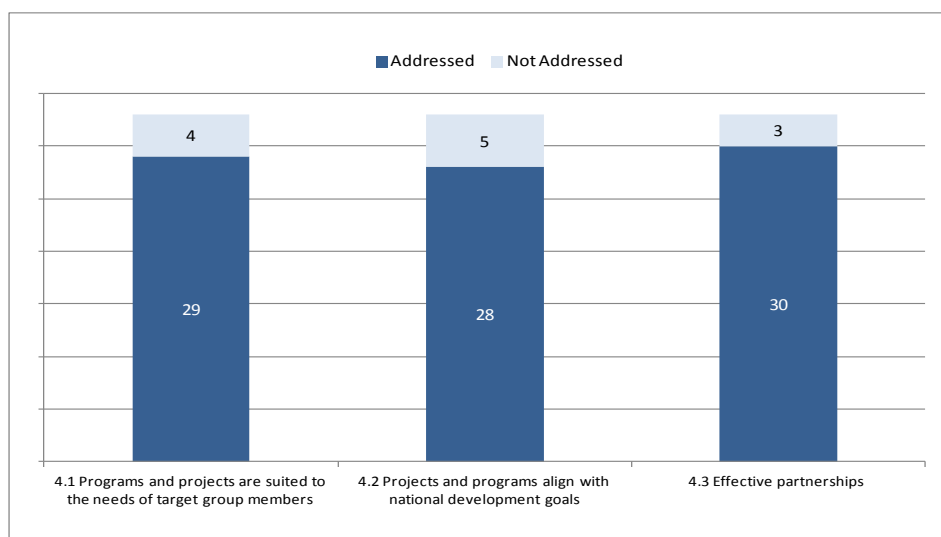
*Country Program Evaluation Paraguay, 2003-2008, p. 17-18.*

## 3.5 Relevance

### 3.5.1 Coverage

There was strong coverage for all sub-criteria on relevance. Almost all evaluations addressed: program suitability to the target group (sub-criterion 4.1), alignment of programs to national development goals (sub-criterion 4.2), and effective partnerships with governments and other agencies (sub-criterion 4.3).

**Figure 3.6 Relevance - number of evaluations that addressed sub-criteria (n=33)**



<sup>48</sup> See, for example, Inter-American Development Bank, Office of Evaluation and Oversight, Country Program Evaluation Paraguay 2003-2008.

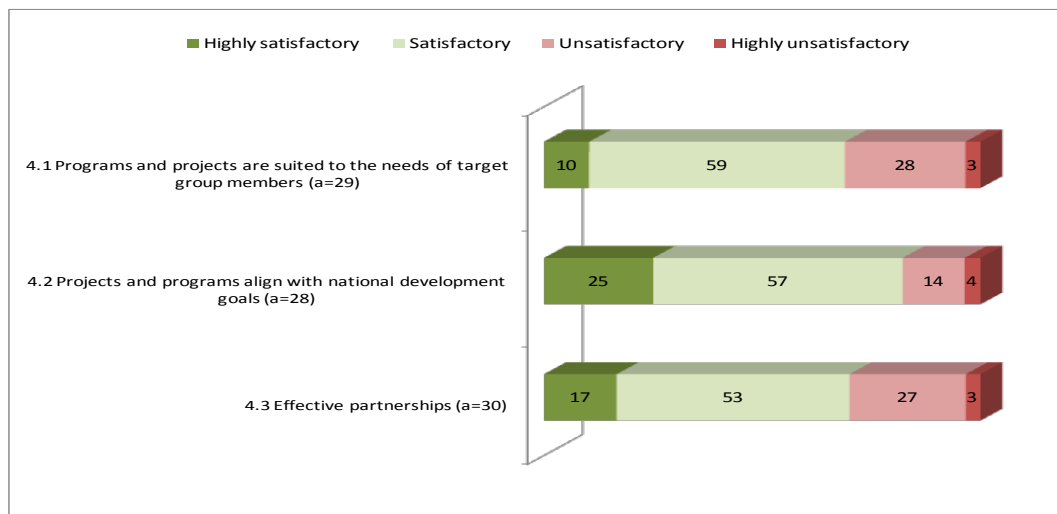
### 3.5.2 Findings

Review findings suggest that IDB programs are generally relevant to their target groups and to the development priorities of borrowing member countries. Of the reports that addressed sub-criterion 4.1, 69% reported program suitability to target groups; and of those that addressed sub-criterion 4.2, 82% reported that the program aligned with country development goals. These findings reflect the fact that IDB country strategies are usually prepared in consultation with client governments.

The needs of two target groups are addressed in country programs: the government and other executing agencies involved in the Bank’s operations; and the beneficiaries of specific operations included in country portfolios. The Country Program Evaluations (CPE) reviewed tend to focus more on the former.<sup>49</sup>

Of the reports that addressed sub-criterion 4.3, 70% noted the presence of effective partnerships between the IDB and country governments, bilateral and multilateral development agencies, NGOs, and other partners.

**Figure 3.7 Relevance - distribution of ratings (%) by sub-criteria<sup>50</sup>**



### 3.5.3 Contributing factors

Several factors contributed to positive findings for IDB program relevance, including:

- A focused approach and identification of niche areas and sectors in which Bank programs have the potential to add value were noted as positive factors (9 evaluations). (See Highlight Box 6).

<sup>49</sup> Country Program Evaluations may also comment on the relevance of particular Bank operations to the intended program beneficiaries, but this information is usually not presented across the portfolio of IDB projects within a country.  
<sup>50</sup> “a” indicates the number of evaluations reviewed that addressed a sub-criterion. In some cases the percentages may not add up to 100% due to rounding.

- Intentional program alignment with the borrowing country's development priorities and the execution of projects clearly derived from government initiatives (8 evaluations).
- The use of appropriate tools for program implementation, including flexible or innovative lending instruments (i.e. policy based loans and conditional lines of credit) and use of technical cooperation to support investment loans or other lending (7 evaluations).
- The relative importance of the IDB as a source of financing compared to other (external or internal) sources (4 evaluations).<sup>51</sup>

#### **Highlight Box 6: Clear alignment to country needs and value added**

In Chile, the Bank's relevance over the strategy period was essentially explained by the government's clear recognition of the Bank's value-added in implementing sustainable public management models and fixing coordination gaps in government programs. This allowed for a high degree of correlation between the country's strategy and the Bank's country strategy, so what was small in terms of resources would not be irrelevant in terms of results.

*Country Program Evaluation Chile 2006-2010, 2010, p. 3-4.*

However several factors can negatively affect the relevance of Bank programs:

- Country program strategies that lack focus, do not take a program approach, and do not clearly identify niche areas for the Bank's work (11 evaluations). Examples include program strategies for Mexico (2001-2006) and Paraguay (2003-2008), which lacked a clear definition of the Bank's comparative advantage.
- Poor selection of lending instruments, or instruments that were not sufficiently adapted to the context (6 evaluations).
- The inadequate quality of diagnostic or analytical work and poor integration into the country program's objectives and lending program (5 evaluations). The limited availability or use of diagnostic studies was shown to limit relevance in the evaluations of Bank programs in Haiti (2007-2011), El Salvador (2004-2008), Paraguay (2003-2008), and Trinidad and Tobago (2000-2008), as well as in the corporate thematic evaluation of the Bank's programming to address the problems of crime and violence in 11 countries in the Latin America and Caribbean region.<sup>52</sup>
- Political contexts in borrowing member countries that limit the ability of the Bank and country governments to reach agreements on strategic issues or on the details of project design and implementation (4 evaluations). The opinions of the Bank and country governments may diverge on specific projects.<sup>53</sup> Unstable political and/or institutional environments may also

<sup>51</sup> Examples include Argentina 2003-2008, the Dominican Republic 2004-2008, Haiti 2007-2011, and Guyana 2002-2006.

<sup>52</sup> OVE, *Prevención del Delito y la Violencia en América Latina y el Caribe: Evidencia de las Intervenciones del BID*, Octubre 2010, p. 17.

<sup>53</sup> For example, on an intervention model for water and sanitation in the Dominican Republic (2004-2008) or broader policies and programs (Venezuela (1999-2007)). As noted in the CPE for Venezuela, "With far fewer resources than contributed by the country in each subsector, and facing disagreements on policies and programs, the Bank found its range of action to be severely diminished. This situation was compounded by the abundance of alternative resources

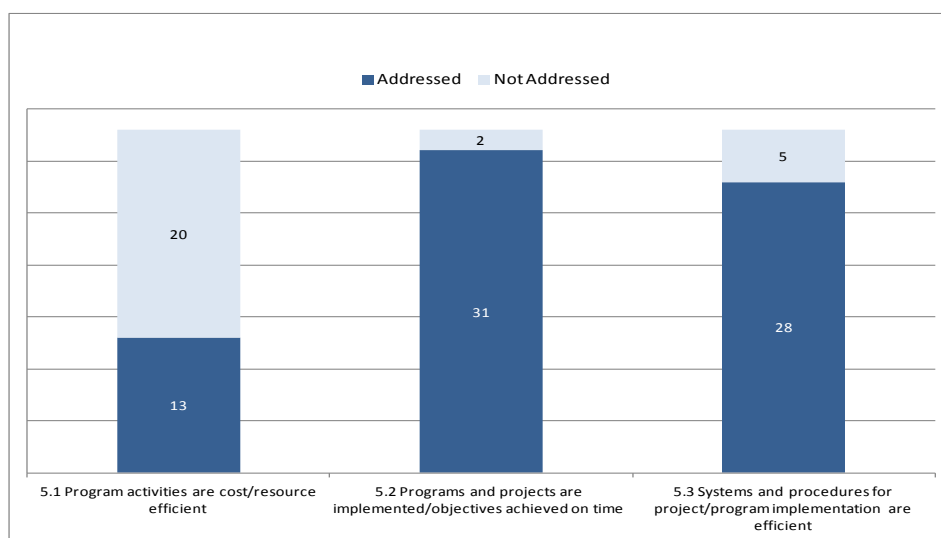
affect the ability of the Bank and country governments to form and maintain effective relationships (e.g. Ecuador 2000-2006 and Bolivia 2004-2007).

## 3.6 Efficiency

### 3.6.1 Coverage

While there was strong coverage for two of the sub-criteria on efficiency, the coverage for sub-criterion 5.1, which addresses the cost-efficiency of program activities, was weak in the sample of evaluation reports. This is not surprising given the challenges of assessing the efficiency of program activities.

Figure 3.8 Efficiency - number of evaluations that addressed sub-criteria (n = 33)



As noted in the IDB’s protocol for conducting Country Program Evaluations (CPE), “measuring efficiency is difficult at overall country program level because of the difficulty in estimating the combined benefit flows of various categories of Bank assistance (i.e., policy support, capacity building, aid coordination).”<sup>54</sup> Instead, CPEs typically draw on proxy indicators of the efficiency of the Bank’s support in comparison to cost. For the most part, the CPEs in the sample analyzed metrics on the IDB’s management of its portfolio. These metrics are developed for different stages of the project cycle and include:

- time from profile to approval (average project design time);
- time from approval to eligibility for first disbursements (indicative of the time required to actually “start-up” a project);
- disbursement performance (indicates the pace of implementation); and

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from the oil sector, as well as by the country’s serious questioning of the role of multilateral agencies.” (Inter-American Development Bank, OVE, Country Program Evaluation: Venezuela 1999-2007).

<sup>54</sup> Inter-American Development Bank, Office of Evaluation and Supervision, Protocol for Country Program Evaluation (CPE), 2008, RE-348-3 p. 8.



- implementation and execution performance (including needs for extensions).

These metrics, which are regularly presented in CPEs, helped inform the assessment of sub-criteria 5.2 and 5.3. While the corporate and thematic evaluations reviewed also commented on efficiency issues related to sub-criteria 5.2 and 5.3, they did not address the cost-efficiency of the program activities reviewed. There was usually no direct data on individual projects or the extent to which project inputs and activities were efficiently producing outputs (schools built, kilometers of roads built, etc.), which may explain why there was weak coverage on sub-criterion 5.1.

### 3.6.2 Key findings

In the reports reviewed that addressed sub-criterion 5.2, 41% offered a positive assessment of the timeliness of program implementation. Of those reports that addressed sub-criterion 5.2, only 32% provided a positive assessment on efficiency of systems and procedures for implementation. There was insufficient coverage of sub-criterion 5.1 on whether program activities are cost/resource efficient to warrant presentation of results on this sub-criterion.

It is important to note that the IDB controls some stages of the project cycle more than others. IDB has more control over project design time (from project profile to approval) and less control over start-up (the time between approval and eligibility for first disbursements) as this requires ratification by Congress in most countries and the borrower must meet certain conditions. Project implementation can also be affected by borrower capacities and the capacities of executing agencies.

**Figure 3.9 Efficiency - distribution of ratings (%) by sub-criteria<sup>55</sup>**



<sup>55</sup> "a" indicates the number of evaluations reviewed that addressed a sub-criterion. In some cases the percentages may not add up to 100% due to rounding.

### 3.6.3 Contributing factors

Evaluation reports rarely commented on factors that contributed positively to efficiency measures but when they did, two factors stood out:

- The right choice of lending instruments was cited as a factor contributing to stronger performance on key portfolio indicators (5 evaluations). For example, conditional credit lines for investment projects can be rapidly executed, disbursed more quickly, and contribute to favourable indicators. The incorporation of flexible lending products (that involve fewer transactions) contributed to the Bank's efficiency indicators in Brazil, Colombia, Peru, and Mexico.
- Operational and administrative changes made by the Bank to strengthen its role during implementation of the country programs (5 evaluations). (See Highlight Box 7). In 2006, for example, the Bank introduced an organizational realignment in order to strengthen the Bank's country focus, sector expertise, and achievement of results.<sup>56</sup> The positive effects of realignment of efforts on efficiency are noted in several reports.

#### **Highlight Box 7: Efforts to improve IDB operational efficiency in Nicaragua**

"The significant increases in the level of concessional resources allocated to Nicaragua resulted in greater complexity in the Bank's portfolio management. The Bank increased the administrative and personnel resources in the country office and instituted numerous initiatives to enhance operational efficiency – actions that have reduced the age of the portfolio and increased execution performance in terms of faster disbursements of investment projects."

*Nicaragua Country Program Evaluation, 2008-2012, p. ix.*

In almost all of the evaluation reports reviewed there were references to the challenges that IDB has faced in efficiently executing its programs (28 evaluations). Key political and institutional factors that are part of the context in which the Bank works were frequently cited as affecting its efficiency, including:

- Issues related to the capacity of executing agencies in areas such as human resources (i.e. staff turnover), project management, and coordination affect project implementation (12 evaluations).
- Political dynamics within borrowing member countries (11 evaluations). In many countries, the executive and legislative branches of government do not coordinate their work. This causes delays in the early stages of the project cycle because IDB loans must be approved by the legislature. In addition, the efficiency of country project implementation is usually affected in times of political crisis (see Highlight Box 8) or following a change in government resulting in a significant policy shift (such as in Bolivia in 2005).

<sup>56</sup> In 2006, the IDB's Board of Executive Directors approved an organizational realignment in order to respond more efficiently to development challenges in Latin America and the Caribbean. The IDB proposed a series of measures aimed at deepening its country focus and sector expertise and enhancing its effectiveness with a renewed emphasis on risk management and achievement of results. Source: <http://www.iadb.org/en/news/news-releases/2006-12-14/inter-american-development-bank-approves-realignment-of-its-basic-organization,3535.html>.

Other limiting factors affecting the timeliness and cost of implementing projects were noted with less frequency in the evaluation reports and included:

- Transactional difficulties, including delays in procurement and contracting (9 evaluations). These were referenced in 8 CPEs and in the thematic evaluation of *IDB Action in Highway Development, 2010*.<sup>57</sup>
- Project design flaws or complexity in project implementation (in terms of number of entities involved and breadth of desired objectives) were considered problematic. Overly complex projects had to be re-designed, thus causing delays and incurring additional administrative costs (6 evaluations).
- Capacity constraints of the IDB country office, including insufficient staff for project supervision. This was especially the case in contexts characterized by a proliferation of small operations in multiple sectors (6 evaluations). The reports also noted inconsistencies between portfolios and the complement of resident sector specialists in the Bank's country offices.
- Shortfalls in the ability of borrowing member countries to provide the agreed counterpart funds (4 evaluations). This was often due to fiscal constraints and caused delays in project implementation.

#### **Highlight Box 8: Political crisis in Honduras and its effects on efficiency**

The period examined in this review was marked by a political crisis sparked in June 2009 that prompted a formal interruption of Bank operations in Honduras. "On the operations side, this "pause" meant interrupting Honduras loan approvals and disbursements from June 2009 to March 2010. Apart from implementation time and cost increases, this interruption created serious project delivery challenges. In some cases, the situation led to the partial or complete dissolution of executing units, irregular use of revolving funds (in part or in full), loss of project data, and expense settlement problems." Nonetheless, the Bank maintained its presence in Honduras during this period and quickly reactivated its support following the crisis.

*Country Program Evaluation: Honduras 2007-2010, p. 17.*

## **3.7 Using evaluation and monitoring to improve development effectiveness**

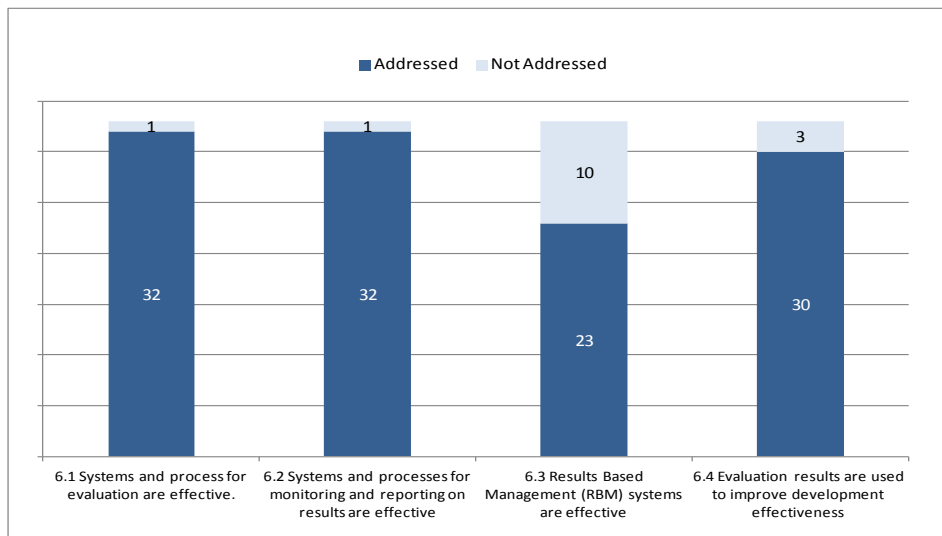
### **3.7.1 Coverage**

Overall, coverage of the four sub-criteria related to evaluation and monitoring to improve development effectiveness was high. However, sub-criterion 6.3 (results-based management) had slightly lower coverage levels. The relatively lower coverage of this sub-criterion reflects the fact that not all evaluation reports explicitly commented on the effectiveness of the Bank's results-based management systems and practices.

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<sup>57</sup> This study assessed the engagement of the IDB in road infrastructure projects in the seven countries receiving the bulk of Bank support (Bolivia, Brazil, Colombia, Guyana, Honduras, Nicaragua, and Peru) over the period 1990-2009.

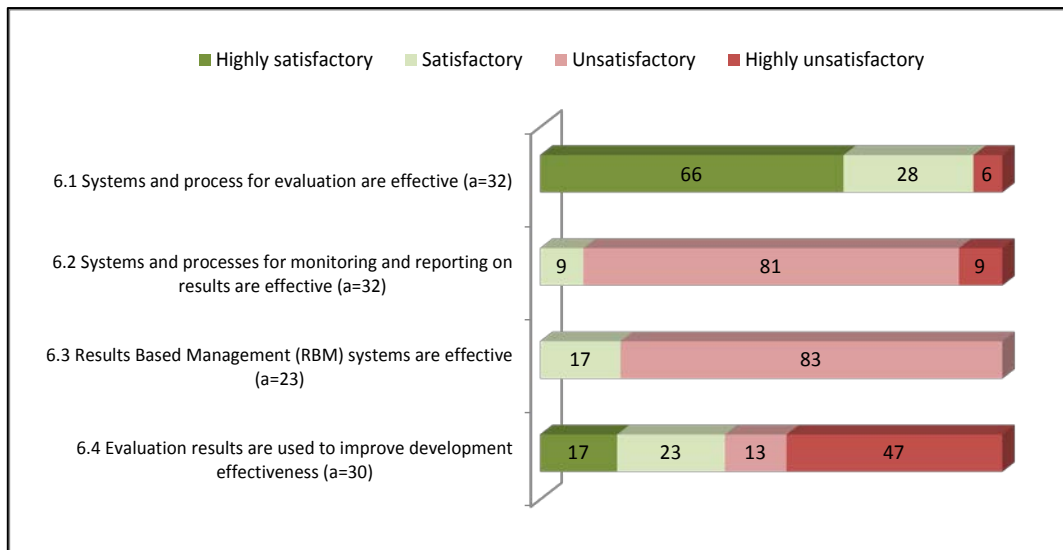
**Figure 3.10 Evaluation and monitoring - number of evaluations that addressed sub-criteria (n=33)**



### 3.7.2 Findings

Although the Bank’s systems and processes for evaluation were rated positively (sub-criterion 6.1), ratings for the other sub- criteria were mixed but generally unsatisfactory.

**Figure 3.11 Evaluation and monitoring - distribution of ratings (%) by sub-criteria<sup>58</sup>**



The positive rating for the effectiveness of systems and processes for evaluation (sub-criterion 6.1) mainly reflects the Bank’s practice of conducting regular Country Program Evaluations (CPE). In the reports reviewed that addressed the effectiveness of systems and processes for

<sup>58</sup> “a” indicates the number of evaluations reviewed that addressed a sub-criterion. In some cases the percentages may not add up to 100% due to rounding.

monitoring and reporting results, findings were mainly unsatisfactory (sub-criterion 6.2). This was also the case for the effectiveness of RBM systems (sub-criterion 6.3). Results were mixed for using evaluation results to improve development effectiveness (sub-criterion 6.4), although most reports pointed to unsatisfactory ratings.

Almost all evaluation reports reviewed pointed to problems with the evaluability of country programs when using both top down (i.e. program level) and bottom up (i.e. project level) approaches.<sup>59</sup> In addition, the CPEs reviewed often did not have many Project Completion Reports to draw on.

The Office of Evaluation and Oversight (OVE) observed that the evaluability of the Bank's portfolio is critically low, thereby making it difficult to provide conclusive evidence about the Bank's development effectiveness; this was a common theme in the CPEs reviewed.

The Independent Review Panel on Evaluation at the Inter-American Development Bank (2011) confirmed the difficulties that OVE had faced to pinpoint the "results of IDB-financed activities."<sup>60</sup>

As noted earlier, this review of development effectiveness does not reflect recent improvements in the Bank's monitoring and evaluation practices or the extent to which program and project evaluability may have increased.

According to the 2013 mid-term evaluation of the IDB-9 Commitments, the Bank has significantly improved its capacity to monitor and report on results. Among other improvements, the Bank has enhanced its Development Effectiveness Framework (DEF), strengthened its procedures and processes for improving project evaluability, and strengthened tools for project monitoring and results reporting. It also notes that not all of the IDB-9 commitments have yet been implemented. Furthermore, the IDB is implementing an ambitious program of impact evaluations (67 are ongoing) with the intent not only of measuring whether resources are used effectively and efficiently in development, but also learning about why programs work and how to make them better.<sup>61</sup> The expectation is that these evaluations will contribute to the knowledge base on development in the region and be used to improve development effectiveness.

### 3.7.3 Contributing factors

The reviewers found few examples of factors positively contributing to the effectiveness of the Bank's monitoring and evaluation practices (only three evaluation reports provided examples of contributing factors).

Two evaluation reports mentioned country capacity as a factor clearly influencing the extent to which project results can be tracked. This was the case in Brazil which has strong institutional capacity in this area and in Mexico, where government programs supported by the IDB are subject to rigorous impact evaluation. One corporate evaluation also mentioned the strength of

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<sup>59</sup> Evaluability refers to the extent to which an activity or a program can be evaluated in a reliable and credible fashion. There are a number of elements that can be used in judging evaluability, including the proper definition of objectives or results, use of appropriate indicators, integration of baselines and targets, and existence of data from monitoring and reporting systems.

<sup>60</sup> Inter-American Development Bank, Strengthening Evaluation to Improve Development Results: Report of the Independent Review Panel on Evaluation at the Inter-American Development Bank (2011), p. 9.

<sup>61</sup> Inter-American Development Bank, Development Effectiveness Overview 2013, p.19-20.

the data collection system of the Multilateral Investment Fund's youth portfolio and its use of rigorous impact evaluations.<sup>62</sup>

The following factors limiting the Bank's ability to demonstrate its contributions to development outcomes and impact were noted:

- Low evaluability of Bank-supported programs and projects (32 evaluations). The CPE for Brazil described this as a systemic problem for the Bank: "The low number of projects that collect information on progress indicates a serious problem with the Bank's monitoring system. In general, independently of the borrower and sector, the older projects lack a clear differentiation between outcomes and outputs; few indicators are SMART<sup>63</sup>; and most projects lack baseline information and data collection mechanisms. Many older projects were retrofitted, as the Bank's systems were evolving, especially Project Completion Reports (PCRs). There is now a general recognition that PCRs provide very limited information."<sup>64</sup>
- Lack of evidence regarding the Bank's use of evaluation recommendations (26 evaluations). Most evaluations reviewed did not include a management response and did not mention the extent to which the recommendations of previous evaluations had been used to improve the effectiveness of country programs. Some evaluations that did include a management response concluded that most of the recommendations outlined in previous evaluation reports remained valid and that little seemed to have been done in terms of their implementation.
- Generally weak and unreliable monitoring and evaluation systems and practices used in the assessment of Bank supported projects and programs (16 evaluations).

#### **Highlight Box 9: Difficulties measuring the Bank's contributions in Suriname**

"Given the country's poor information systems combined with the failure of the Bank's own information systems the expectation of being able to determine development effectiveness is low. This expectation is borne out. IDB sovereign loan projects and the government programs that they are embedded in are essentially data free; they rarely have adequate numerical baseline values for outcomes (goals and purposes) and numerical specification of their targets and even less so for recent values of the outcomes."

*Suriname Country Program Evaluation 2007-2010, p. 23.*

- Poor program and project results frameworks with weak and incomplete indicators and a lack of targets, baselines, and milestones were noted as a limiting factor (16 evaluations). Many of the evaluation reports reviewed indicated that poor program and project results frameworks constitute a major factor limiting the Bank's capacity to systematically demonstrate results.
- Imprecisely defined development objectives impeded the Bank's measurement of results and implementation of Results Based Management practices (9 evaluations).
- Weak data collection capacity in member countries was a major obstacle to developing sound M&E systems and impeded the Bank's ability to collect quantitative results data (4 evaluations).

<sup>62</sup> Second Independent Evaluation: Multilateral Investment Fund, Final Report to Donors, OVE, March 2013.

<sup>63</sup> Specific, Measurable, Assignable, Realistic, Time-related.

<sup>64</sup> CPE Brazil, 2007-2010.

In particular, weak data collection capacity was noted in Haiti, Guyana, and Trinidad and Tobago.

## 4. Conclusions

### Conclusions on the development effectiveness of the IDB

To the extent possible, the evaluation team considered the Bank's recent progress as reported in the Office of Evaluation and Oversight's mid-term evaluation of the implementation of IDB-9 commitments. However, an exhaustive analysis of the implications of recent reforms for the Bank's development effectiveness was beyond the scope of this review. Based on the key findings and related contributing factors reported, this review concludes the following:

**1. IDB programs are relevant to the needs of target groups and support the development plans and priorities of IDB borrowing member countries.** The IDB developed effective relationships with governments. The Bank's programs were seen as particularly relevant in countries where it applied a strategic approach that clearly identified its comparative advantage. In addition, its level of alignment with the borrowing country's development priorities and its use of appropriate tools for program implementation contributed to the relevance of the Bank's programs.

**2. For many years, the IDB lacked evidence of progress toward its stated development objectives and results; however, this is beginning to change.** The programs reviewed often did not provide evidence of progress towards their stated development objectives. This was due in part to a lack of information from systematic monitoring of project or program level results and to contextual challenges that hindered program implementation. However, where information was available, the Bank was comparatively more successful in countries where it was able to develop a clear strategic approach, a specific market niche, and a focus on a limited number of areas in which it had comparative advantages. As further noted below, the Bank has made significant progress since 2008 in its design of projects and country programs and in the importance it gives to evaluation and learning. The retrospective nature of this review did not fully capture that growing evidence base on results.

**3. The IDB had shortcomings in project and program level planning and in monitoring and evaluation, which limited the availability of information on development effectiveness during the period covered.** The evaluations reviewed consistently pointed to problems on how Bank projects and programs identified results, defined indicators, and monitored progress, which led to poor evaluability of individual projects and country programs. The mid-term evaluation of IDB-9 suggests, however, that the introduction of the Development Effectiveness Framework in 2008 appears to be promoting development effectiveness at the project level and that progress in this area is promising.<sup>65</sup>

**4. The review did not find solid evidence of the extent to which the results of Bank-supported programs are sustainable.** Only 36% of the evaluation reports reviewed suggested that the Bank had contributed to strengthening the enabling environment for development and

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<sup>65</sup> Inter-American Development Bank, Office of Evaluation and Oversight, OVE, *Mid-Term Evaluation of IDB-9 Commitments*, p. xiii.

40% indicated that programs and projects were sustainable in terms of institutional capacity. Sustainability seems to be hampered by a poor enabling environment in many countries. Factors limiting sustainability include a lack of recurrent cost funding mechanisms for infrastructure and service delivery projects, a lack of country ownership and political will, and weak capacity of the Bank-supported institutions.

**5. The IDB has a strong system for conducting country program evaluations, but there is limited evidence that evaluations were used to improve development effectiveness.** The IDB has a strong independent evaluation function. Country program evaluations have been carried out regularly at the IDB. However, approximately two-thirds of the evaluation reports reviewed did not include a management response or other evidence that the Bank took into account the recommendations from these evaluations. The Bank has taken recent actions in this area and in 2013 introduced a platform to record, manage, and monitor OVE's recommendations. In addition, the Bank is implementing an ambitious plan to carry out impact evaluations (more than 67 are currently underway) with the intent of using these strategically to make meaningful contributions to the development knowledge base.

**6. The IDB has made a strong commitment to gender equality in recent years, but this review found that its programs and evaluations do not yet regularly integrate gender equality as a cross-cutting theme.** The evaluation reports reviewed provided insufficient coverage of gender equality, and the absence of gender equality in IDB projects was noted in previous studies.<sup>66</sup> The IDB has begun to address this situation by introducing a Gender Equality Policy in 2010 and a Gender Action Plan that provide a clear focus on gender equality and women's empowerment as integral to development. The integration of gender equality considerations in IDB projects, country strategies, and evaluations is still in early stages.

**7. The Bank has an environment policy, but the sample of evaluations reviewed provided insufficient coverage of environmental sustainability to warrant presentation of results in this area.** The IDB takes a two-pronged approach to implementing its commitment to environmental sustainability: a *mainstreaming approach*, which seeks to enhance environmental and social benefits; and a *safeguards approach*, which seeks to minimize and compensate for negative impacts.<sup>67</sup> Recent reports suggest that the mainstreaming of environmental sustainability is a work in progress and that it is still not effectively integrated into the Bank's country strategies. The sample of evaluations reviewed did not report on the extent to which program and project results were environmentally sustainable.

**8. The Bank has faced challenges in managing its portfolio of projects efficiently, often due to the operating context at the country level.** Many of the evaluations noted delays in the start-up or during the implementation of IDB projects. Complex country processes (such as those required for Congressional ratification of loans), the varying capacities of executing agencies, transactional difficulties (including delays in procurement and contracting), and complexities in project design resulted in delays and additional costs in the project cycle.

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<sup>66</sup> Inter-American Development Bank, Office of Evaluation and Oversight, OVE, ¿Se está integrando la perspectiva de género en los proyectos del Banco?, RE-373, July 2010.

<sup>67</sup> Inter-American Development Bank, Office of Evaluation and Oversight, Mid-Term Evaluation of IDB-9 Commitments: Environmental and Social Safeguards, including Gender Policy, 2013, p. i.



# Annex 1: Effectiveness Criteria

**Table 1: Common Development Effectiveness Assessment Criteria**

Part One: Criteria for Assessing Development Effectiveness	
<b>Achieving Development Objectives and Expected Results</b>	
1.1	Programs and projects achieve their stated development objectives and attain expected results.
1.2	Programs and projects have resulted in positive benefits for target group members.
1.3	Programs and projects make a difference for a substantial number of beneficiaries and where appropriate contributed to national development goals.
1.4	Programs contributed to significant changes in national development policies and programs (including for disaster preparedness, emergency response and rehabilitation) (policy impacts) and/or to needed system reforms.
<b>Cross-Cutting Themes – Inclusive Development which can be Sustained</b>	
2.1	Extent to which multilateral organization supported activities effectively address the cross-cutting issue of gender equality.
2.2	Extent to which changes are environmentally sustainable.
<b>Sustainability of Results/Benefits</b>	
3.1	Benefits continuing or likely to continue after project or program completion or there are effective measures to link the humanitarian relief operations, to rehabilitation, reconstruction and, eventually, to longer term development results.
3.2	Projects and programs are reported as sustainable in terms of institutional and/or community capacity.
3.3	Programming contributes to strengthening the enabling environment for development.
<b>Relevance of Interventions</b>	
4.1	Programs and projects are suited to the needs and/or priorities of the target group.
4.2	Projects and programs align with national development goals.
4.3	Effective partnerships with governments, bilateral and multilateral development and humanitarian organizations and NGOs for planning, coordination and implementation of support to development and/or emergency preparedness, humanitarian relief and rehabilitation efforts.
<b>Efficiency</b>	
5.1	Program activities are evaluated as cost/resource efficient.
5.2	Implementation and objectives achieved on time (given the context, in the case of humanitarian programming).
5.3	Systems and procedures for project/program implementation and follow up are efficient (including systems for engaging staff, procuring project inputs, disbursing payment, logistical arrangements, etc.).
<b>Using Evaluation and Monitoring to Improve Development Effectiveness</b>	
6.1	Systems and process for evaluation are effective.
6.2	Systems and processes for monitoring and reporting on program results are effective.
6.3	Results-based management (RBM) systems are effective.

6.4 Evaluation is used to improve development effectiveness.

**Notes on Using the Criteria**

In applying the above criteria to the review of evaluations concerning a given MO it is important to note the following guidelines:

- The findings of each evaluation as they relate to each of the 15 sub-criteria listed above (plus 4 relating to the use of evaluation) are to be classified using a four-point scale (Highly Satisfactory, Satisfactory, Unsatisfactory, and Highly Unsatisfactory).
- Analysis and reporting will be by sub-criteria and criteria only. There is no intention to combine criteria into a single index of development effectiveness.
- Specification of micro-indicators is not recommended because experience with similar evaluation reviews suggests that over-specification of the review criteria soon leads to very few evaluations being specific enough in their findings to address a significant number of micro indicators. In essence, this would involve over retro-fitting of external criteria to the evaluations in a way which distorts their original design. The experience of the pilot tests suggests that the level of specification illustrated is precise enough to allow for reliable classification of evaluation findings and still broad enough that most reasonably well designed evaluations will have findings which contribute to a credible analysis.

## Annex 2: Evaluation Sample

**Table 2: List of Evaluation Reports included in the Proposed Sample of Evaluation Reports**

No.	Year	Title	Type
1	2013	Second Independent Evaluation: Multilateral Investment Fund	Corporate Evaluation
2	2012	Evaluation of Transnational Programs at the IDB	Corporate Evaluation
3	2010	Crime and Violence Prevention in Latin America and the Caribbean: Evidence from IDB's Interventions	Corporate Evaluation
4	2012	Country Program Evaluation: Guatemala: (2008-2011)	Country Program Evaluation
5	2012	Country Program Evaluation: Guyana (2008-2012)	Country Program Evaluation
6	2008	Country Program Evaluation Guyana (2002-2006)	Country Program Evaluation
7	2012	Country Program Evaluation: Mexico (2007-2011)	Country Program Evaluation
8	2008	Country Program Evaluation: Mexico (2001-2006)	Country Program Evaluation
9	2012	Country Program Evaluation: Nicaragua (2008-2012)	Country Program Evaluation
10	2008	Country Program Evaluation: Nicaragua (2002-2007)	Country Program Evaluation
11	2011	Country Program Evaluation: Bolivia (2008-2010)	Country Program Evaluation
12	2008	Country Program Evaluation: Bolivia (2004-2007)	Country Program Evaluation
13	2012	Country Program Evaluation: Peru (2007-2011)	Country Program Evaluation
14	2012	IDB-9: Evaluation of IDB-9 Commitments for Haiti	Country Program Evaluation
15	2011	Country Program Evaluation: Haiti (2007-2011)	Country Program Evaluation
16	2011	Country Program Evaluation: Brazil (2007-2010)	Country Program Evaluation
17	2009	Country Program Evaluation: Brazil (2000-2008)	Country Program Evaluation
18	2011	Country Program Evaluation: Colombia (2007-2010)	Country Program Evaluation
19	2011	Country Program Evaluation: Honduras (2007-2010)	Country Program Evaluation
20	2009	Country Program Evaluation: Venezuela (1999-2007)	Country Program Evaluation

No.	Year	Title	Type
21	2008	Country Program Evaluation: Ecuador (2000-2006)	Country Program Evaluation
22	2011	Country Program Evaluation: Suriname (2007-2010)	Country Program Evaluation
23	2010	Country Program Evaluation: Argentina (2003-2008)	Country Program Evaluation
24	2010	Country Program Evaluation: Barbados (2005-2009)	Country Program Evaluation
25	2010	Country Program Evaluation: Chile (2006-2010)	Country Program Evaluation
26	2010	Country Program Evaluation: Dominican Republic (2004-2008)	Country Program Evaluation
27	2010	Country Program Evaluation: El Salvador (2004-2008)	Country Program Evaluation
28	2010	Country Program Evaluation: Jamaica (2003-2008)	Country Program Evaluation
29	2010	Country Program Evaluation: Panama (2005-2009)	Country Program Evaluation
30	2009	Country Program Evaluation: Paraguay (2003-2008)	Country Program Evaluation
31	2009	Country Program Evaluation: The Bahamas (2001-2008)	Country Program Evaluation
32	2009	Country Program Evaluation: Trinidad and Tobago (2000-2008)	Country Program Evaluation
33	2010	IDB Action in Highway Development	Sector & Thematic Evaluation

**Table 3: List of Evaluation Reports excluded from the Sample of Evaluation Reports**

Year	Title	Type
2010	Evaluation of the Bank's Processes for Managing Technical Cooperation	Corporate Evaluation
2012	Mid-term Evaluation of IDB-9 Commitments: Overview	Corporate Evaluation
2013	IDB-9: Access to Information	Corporate Evaluation
2013	IDB-9: Assessment of IDB-9's Private Sector Development Framework	Corporate Evaluation
2011	An Evaluation of One Pillar of the IDB's Knowledge and Learning Strategy: Training Activities for IDB Operations Staff	Corporate Evaluation
2013	IDB-9: Country Systems	Corporate Evaluation
2013	IDB-9: Human Resources Processes	Corporate Evaluation
2013	IDB-9: IDB Integrated Strategy for Climate Change Adaptation and Mitigation, and Sustainable and Renewable Energy	Corporate Evaluation
2013	IDB-9: Knowledge Products	Corporate Evaluation

Year	Title	Type
2010	Is Gender Being Mainstreamed in Bank's Projects?	Corporate Evaluation
2010	The Country Studies Initiative and its Effect on the Bank's Knowledge Strategy	Corporate Evaluation
2009	Evaluation Findings Regarding IDB-8 Guidance and Implications for Future Capital Increase Agreements	Corporate Evaluation
2011	Resettlement Processes and their Socioeconomic Impact: Porce II Hydroelectric Project, Colombia	Project & Impact Evaluation
2010	Impact Evaluation of the Business Development Program for the Software Industry in Uruguay	Project & Impact Evaluation
2010	Impact Evaluation of the Program for the Development of Industrial Districts in Brazil	Project & Impact Evaluation
2012	Life Skills, Employability and Training for Disadvantage Youth: Evidence from a Randomized Evaluation Design	Project & Impact Evaluation
2011	Innovation Policy and Employment: Evidence from an Impact Evaluation in Argentina	Project & Impact Evaluation
2011	OVE's Environmental Performance Review applied to the Energy Sector	Sector & Thematic Evaluation
2010	Do we know if the Bank's pro-poor projects benefit the poor?	Sector & Thematic Evaluation

## Annex 3: Methodology

This annex provides a more detailed explanation of the population identification and sampling methodology used for the review of IDB development effectiveness.

It is structured around the sequence of tasks undertaken during the review: determining the rationale for the review; drawing the sample of evaluations; undertaking the process of review and controlling for quality during the analysis phase; and, assessing the level of coverage provided by the development effectiveness review.

The review of evaluation reports was supplemented by a review of IDB corporate documents. These were reviewed to expand the profile of the organization and its programming. A list of the documents consulted is provided in Annex 6.

### Rationale for the Development Effectiveness Review

The term “common approach” describes the use of a standard methodology, as implemented in this review, to consistently assess the development effectiveness of multilateral organizations. It offers a rapid and cost effective way to assess the development effectiveness of the organization, relative to a more time consuming and costly joint evaluation.<sup>68</sup> The approach used in this review to assess the development effectiveness of multilateral organizations was developed to address a gap in the information available to bilateral development agencies.

Although multilateral organizations produce annual reports for their management and/or boards, member states were not receiving a comprehensive overview of the performance on the ground of multilateral organizations. This approach complements the assessments of the Multilateral Organization Performance Assessment Network (MOPAN). The approach suggests conducting a review based on the organization’s own evaluation reports when two specific conditions exist:<sup>69</sup>

- There is a need for field-tested and evidence-based information on the development effectiveness of the organization.
- The multilateral organization under review has an evaluation function that produces an adequate body of reliable and credible evaluation information that supports the use of a meta-synthesis methodology to synthesize an assessment of the organization’s development effectiveness.

Both conditions were satisfied for IDB, as explained in the following section.

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<sup>68</sup> “Joint evaluation” refers to a jointly funded and managed comprehensive institutional evaluation of an organization. It does not refer to DAC/UNEG Peer Reviews of the Evaluation Function.

<sup>69</sup> Assessing the Development Effectiveness of Multilateral Organizations: Approach, Methodology and Guidelines, Management Group of the Task Team on Multilateral Effectiveness, DAC EVALNET, 2011.

## Steps in the Process

The Review Team conducted the preliminary review of the information available to inform the Development Effectiveness Review of IDB. The preliminary review involved the following steps:

- **Initiating the dialogue:** DFATD conducted an initial briefing with IDB in Washington, with opportunities for the IDB to ask questions about the assessment methodology and for DFATD to confirm the universe of evaluation reports and to map out the various sources of evaluation products at the Bank. The Review Team also participated via telephone.
- **Determining the universe of evaluations:** DFATD compiled an initial list of evaluation reports published between 2008 and 2013, which was then verified and completed by the IDB. The finalization of the universe of evaluation reports involved several discussions and exchanges with OVE and management units in the IDB. The universe of evaluations published over this period was considered final on 21 December 2013 and included a total of 94 evaluation reports.
- **Review of performance reporting and evaluation function:** The Review Team carried out a desk review of IDB's reporting on development effectiveness and on the evaluation function. The desk review of IDB's reporting on development effectiveness was based on the criteria drawn from the methodological guidance from DAC-EVALNET for conducting such reviews to assess the organisation's development effectiveness reporting.<sup>70</sup> The desk review of IDB's evaluation function was based on the criteria of independence, coverage and evidence of use of evaluation.
- **Quality screening of evaluation reports:**<sup>71</sup> Each evaluation report in the universe was reviewed for quality according to 11 DAC-EVALNET evaluation quality criteria of the DAC-EVALNET Evaluation Quality Screening Scoring Guide listed in Annex 4. The guide includes two quality thresholds for each evaluation report – one based on total points received and another (hereafter referred to as the “methodological” threshold) based on the scores on the criteria related to (i) use of multiple lines of evidence, (ii) design of the evaluation, and (iii) findings and conclusions that are relevant and evidence based. The latter threshold focuses on the criteria that relate most directly to the quality of the information to be used for the assessment of development effectiveness since if an evaluation does not score well with respect to the design and implementation of the evaluation methodologies, then it is not likely to provide credible information on the MO's effectiveness. An evaluation report must meet both thresholds in order to be considered for the Development Effectiveness Review. As a result of this exercise, a subset of 52 evaluation reports (corresponding to 55% of the entire universe of

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<sup>70</sup> The criteria are: i) the focus on DAC-EVALNET criteria for development effectiveness; ii) the comprehensiveness (coverage) of reporting; and iii) the credibility of the evidence used in these reports.

<sup>71</sup> A quality assurance process was also conducted at this stage to ensure consistency in ratings of the 94 evaluations. Approaches for the quality assurance included: (a) team meetings on the different types of evaluation (Country Program Evaluations, Project & Impact Evaluations, etc.) to discuss issues, concerns, and challenges in rating, (b) inter-rater reliability on at least two evaluation reports for each rater, (c) peer review of approximately 20% of the reports reviewed.

evaluation reports) was found suitable<sup>72</sup> for conducting the meta-synthesis that is foreseen under Scenario B of the DAC-EVALNET methodology.

Following the preliminary review, which led to the recommendation of applying Scenario B of the DAC-EVALNET methodology to the subset of 52 evaluation reports, a sample was drawn for the purposes of conducting the meta-synthesis. Nineteen reports were removed from the subset, among which twelve corporate evaluations since they did not report on any of the six common development effectiveness assessment criteria<sup>73</sup>, and the five project and impact evaluations, as these either were too narrow in scope (focusing only on a particular project), did not specify IDB's role, or had been designed from a research perspective. As a result, the selected sample consisted of a total of 33 evaluation reports. The sample is provided in Annex 2.

### Key characteristics of the evaluation sample

The sample of 33 evaluation reports that were considered for the development effectiveness review consisted of 29 country program evaluations, 2 corporate evaluations, and 2 thematic and sector evaluation. The key characteristics of the sample are described below.

- **Geographic Coverage:** The evaluation sample covers the majority of IDB's borrowing member countries, including the five borrowing member countries receiving the highest levels of loan and guarantee approvals from the IDB from 2008-2013 (i.e. Argentina, Brazil, Mexico, Colombia, and Peru). The sample also includes countries from each of the Bank's four country groupings, based on their relative level of development.<sup>74</sup>
- **Coverage of the Bank's concessional financing mechanisms :** The sample includes evaluation reports from countries in the region receiving concessional financing from the IDB's Fund for Special Operations (including Bolivia, Guatemala, Guyana, Haiti, Honduras, Nicaragua, and Paraguay) as well as grants through the IDB Grant Facility (in the case of Haiti).

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<sup>72</sup> The 52 evaluation reports met the two quality thresholds that ensure that "the findings and conclusions of the evaluation can be relied on as a reasonable guide to the development effectiveness of that element of MO programming which is covered by the evaluation report under review". OECD DAC Network on Development Effectiveness. Assessing the Development Effectiveness of Multilateral Organizations: Guidance on the Methodology Approach. Revised June 2012; page 18.

<sup>73</sup> These are: Achievement of development objectives and expected results; Cross-cutting themes (environmental sustainability and gender equality); Sustainability of results/benefits; Relevance of interventions; Efficiency; and, Using evaluation and monitoring to improve development effectiveness.

<sup>74</sup> The sample covered four countries from Group A which includes the region's more advanced economies (Argentina, Brazil, Mexico, and Venezuela); three countries from Group B including middle developing countries (Chile, Colombia, and Peru); eight countries from Group C which includes countries with insufficient markets (the Bahamas, Barbados, Costa Rica, Jamaica, Panama, Suriname, Trinidad and Tobago, and Uruguay); and finally eleven countries from Group D including the least-developed countries (Belize, Bolivia, Dominican Republic, Ecuador, El Salvador, Guatemala, Guyana, Haiti, Honduras, Nicaragua, and Paraguay). Source: <http://www.iadb.org/en/about-us/loans-in-foreign-exchange,6244.html>.



- **Broad Representation of IDB Operations (volume and type):** The evaluation sample represents an important proportion (i.e. 94%) of the IDB's loan and guarantee approvals in the period between 2007-2010.<sup>75</sup> In addition, the sample includes the most recent evaluation of the Multilateral Investment Fund, which approved 76 projects with an overall value of US \$93.4 million in 2012.<sup>76</sup> Given the emphasis on Country Program Evaluations, the sample included performance information on different types of Bank products, including policy-based loans, lines of credit, investment loans, and technical cooperation, among others.
- **Coverage of Development Effectiveness Criteria:** Although the sampled reports all addressed development effectiveness criteria, the extent to which individual criteria and sub-criteria were covered varied from one evaluation report to another.
- **Timeframe:** All reports included in the evaluation sample were published between 2008 and 2013. Most evaluation reports focused on programming carried out between 2000 and 2010. As a consequence, neither the universe of evaluation reports nor the sample provide many insights into the results of IDB operations following its commitments outlined in IDB-9.

**Table 4: Coverage of Effectiveness Criteria**

Criteria and sub-criteria	Number of evaluations that addressed sub-criteria (a)	Coverage level <sup>77</sup>
<b>1. Achievement of development objectives and expected results</b>		
1.1 MO supported programs and projects achieve their stated development and/or humanitarian objectives and attain expected results.	33	Strong
1.2 MO supported programs and projects have resulted in positive benefits for target group members.	19	Moderate
1.3 MO programs and projects made differences for a substantial number of beneficiaries and where appropriate contributed to national development goals.	13	Weak
1.4 MO activities contributed to significant changes in national development policies and programs (including for disaster preparedness, emergency response and rehabilitation) (policy impacts) and/or to needed system reforms.	25	Strong
<b>2. Cross Cutting Themes: Inclusive Development Which Can Be Sustained</b>		
2.1 Extent MO supported activities effectively address the cross-cutting issue of gender equality.	0	Weak
2.2 Extent changes are environmentally sustainable.	5	Weak

<sup>75</sup> This percentage was calculated based on figures on approved loans and guarantees provided in the IDB's annual reports from 2007 to 2010.

<sup>76</sup> It is important to note that it is not possible to know the exact composition of the sample with regard to sovereign versus non-sovereign guarantee operations, strategic priorities, sector, or other characteristics.

<sup>77</sup> Coverage level: Strong: \*a=25 – 33; Moderate: \*a= 17 –24; Weak: \*a = 0 – 17.

Criteria and sub-criteria	Number of evaluations that addressed sub-criteria (a)	Coverage level <sup>77</sup>
<b>3. Sustainability</b>		
3.1 Benefits continuing or likely to continue after project or program completion or there are effective measures to link the humanitarian relief operations, to rehabilitation, reconstruction and, eventually, to longer-term developmental results.	12	Weak
3.2 Extent MO supported projects and programs are reported as sustainable in terms of institutional and/or community capacity.	20	Moderate
3.3 Extent MO development programming contributes to strengthening the enabling environment for development.	25	Strong
<b>4. Relevance</b>		
4.1 MO supported programs and projects are suited to the needs and/or priorities of the target group	29	Strong
4.2 MO supported development projects and programs align with national development goals	28	Strong
4.3 MO has developed an effective partnership with governments, bilateral and multilateral development and humanitarian organizations and NGOs for planning, coordination and implementation of support to development and/or emergency preparedness, humanitarian relief and rehabilitation efforts.	30	Strong
<b>5. Efficiency</b>		
5.1 Program activities are evaluated as cost/resource efficient	13	Weak
5.2 Evaluation indicates implementation and objectives achieved on time (given the context, in the case of humanitarian programming)	31	Strong
5.3 Evaluation indicates that MO systems and procedures for project/program implementation and follow up are efficient (including systems for engaging staff, procuring project inputs, disbursing payment, logistical arrangements etc.)	28	Strong
<b>6. Using Evaluation and Monitoring to Improve Development Effectiveness</b>		
6.1 Systems and process for evaluation are effective	32	Strong
6.2 Systems and processes for monitoring and reporting on program results are effective	32	Strong
6.3 Results Based Management (RBM) systems are effective	23	Moderate
6.4 MO makes use of evaluation to improve development effectiveness	30	Strong

## Annex 4: Evaluation Quality Scoring Grid

	Points for criteria scored	Maximum Points
<b>A</b>	<b>Purpose of the evaluation:</b>	
	- why the evaluation was done (1)	3
	- what triggered the evaluation (including timing in the project/program cycle) (1)	
	- how evaluation is to be used (1)	
<b>B</b>	<b>Evaluation objectives</b>	
	- evaluation objectives are clearly stated (1)	2
	- objectives logically flow from purpose (1)	
<b>C</b>	<b>Organization of the evaluation</b>	
	- logical structure to the organization of the evaluation (1)	3
	- evaluation is well written (1)	
	- clear distinction between evidence, findings, conclusions, and recommendations (1)	
<b>D</b>	<b>Subject evaluated is clearly described</b>	
	Evaluation describes:	
	- the activity/program being evaluated (1)	4
	- the program's expected achievements (1)	
	- how the program addresses the development problem (1)	
	- the implementation modalities used (1)	
<b>E</b>	<b>Scope of the evaluation</b>	
	Evaluation defines the boundaries of the evaluation in terms of:	
	- time period covered (1)	4
	- implementation phase under review (1)	
	- geographic area (1)	
- dimensions of stakeholder involvement being examined (1)		

<b>F</b>	<b>Evaluation criteria</b>	
	Evaluation criteria include:	
	- the achievement of development objectives and expected results (including impacts) (1)	5
	- cross-cutting issues: inclusive development which is gender sensitive and environmentally sustainable (1)	
	- the sustainability of benefits and positive results achieved (1)	
	- the relevance of MO activities and supported projects and programs (1)	
- the efficiency of MO operations in support of projects and programs (1)		
<b>G</b>	<b>Multiple lines of evidence</b>	
	- one point (1) for each line of evidence used (case studies, surveys, site visits, interviews, etc.), up to a maximum of four points (4)	4
<b>H</b>	<b>Evaluation design</b>	
	Elements of a good evaluation design include:	
	- an explicit theory of how objectives and results were to be achieved (1)	5
	- specification of the level of results achieved (output, outcome, impact) (1)	
	- baseline data (quantitative or qualitative) on conditions prior to program implementation (1)	
	- comparison of conditions after program delivery to those before (1)	
- a qualitative or quantitative comparison of conditions among program participants and a control group (1)		
<b>I</b>	<b>Evaluation findings and conclusions are relevant and evidence based</b>	
	Evaluation report includes:	
	- evaluation findings relevant to the assessment criteria (1)	4
	- findings that are supported by the chosen methodology (1)	
	- a clear logical link between the evidence and the finding (1)	
- conclusions which are linked to the evaluation findings as reported (1)		
<b>J</b>	<b>Evaluation limitations</b>	
	- statement of the limitations of the methodology (1)	3
	- impact of limitations on evaluation (1)	
	- remedies of limitations (1)	

K	<b>Evaluation Recommendations</b>	
	- evaluation contains recommendations that flow from findings and conclusions (1)	3
	- recommendations are directed to one or more organization (1)	
	- recommendations are aimed at improving development effectiveness (1)	
<b>Total (required to have a minimum of 25 points)</b>		40
<b>Total for Criteria G, H and I (required to have minimum of 10 points)</b>		13

# Annex 5: Guide for Classifying Evaluation Findings<sup>78</sup>

Criteria	(1) Highly Unsatisfactory	(2) Unsatisfactory	(3) Satisfactory	(4) Highly Satisfactory
<b>Common Development Evaluation Assessment Criteria</b>				
<b>1. Achievement of Development Objectives and Expected Results</b>				
1.1 MO supported programs and projects achieve their stated development and/or humanitarian objectives and attain expected results.	Less than half of stated output and outcome objectives have been achieved including one or more very important output and/or outcome level objectives.	Half or less than half of stated output and outcome level objectives are achieved.	MO supported programs and projects either achieve at least a majority of stated output and outcome objectives (more than 50% if stated) or that the most important of stated output and outcome objectives are achieved.	MO supported programs and projects achieve all or almost all significant development and/or humanitarian objectives at the output and outcome level.
1.2 MO supported programs and projects have resulted in positive benefits for target group members.	Problems in the design or delivery of MO supported activities mean that expected positive benefits for target group members have not occurred or are unlikely to occur.	MO supported projects and programs result in no or very few positive changes experienced by target group members. These benefits may include the avoidance or reduction of negative effects of a sudden onset or protracted emergency.	MO supported projects and programs have resulted in positive changes experienced by target group members (at the individual, household or community level). These benefits may include the avoidance or reduction of negative effects of a sudden onset or protracted emergency.	MO supported projects and programs have resulted in widespread and significant positive changes experienced by target group members as measured using either quantitative or qualitative methods (possibly including comparison of impacts with non-program participants). These benefits may include the avoidance or reduction of negative effects of a sudden onset or protracted emergency.

<sup>78</sup> These operational guidelines are meant to be flexible and can be adapted to the context of the MO and the review team. However, while a team is free to make reasonable modifications to the guidelines for each of the sub-criterion, it should not modify the criteria and sub-criteria themselves.

Criteria	(1) Highly Unsatisfactory	(2) Unsatisfactory	(3) Satisfactory	(4) Highly Satisfactory
1.3 MO programs and projects made differences for a substantial number of beneficiaries and where appropriate contributed to national development goals.	MO supported projects and programs have not contributed to positive changes in the lives of beneficiaries as measured quantitatively or qualitatively.	MO supported projects and programs have contributed to positive changes in the lives of only a small number of beneficiaries (when compared to project or program targets and local or national goals if established).	MO supported projects and programs have contributed to positive changes in the lives of substantial numbers of beneficiaries as measured quantitatively or qualitatively. These may result from development, relief, or protracted relief and rehabilitation operations and may include the avoidance of negative effects of emergencies.	MO supported projects and programs have contributed to positive changes in the lives of substantial numbers of beneficiaries. Further, they have contributed to the achievement of specific national development goals or have contributed to meeting humanitarian relief objectives agreed to with the national government and/or national and international development and relief organizations.
1.4 MO activities contributed to significant changes in national development policies and programs (including for disaster preparedness, emergency response and rehabilitation) (policy impacts) and/or to needed system reforms.	National policies and programs in a given sector or area of development (including disaster preparedness, emergency response and rehabilitation) were deficient and required strengthening but MO activities have not addressed these deficiencies.	MO activities have not made a significant contribution to the development of national policies and programs in a given sector or area of development, disaster preparedness, emergency response or rehabilitation. (Policy changes in humanitarian situations may include allowing access to the effected populations).	MO activities have made a substantial contribution to either re-orienting or sustaining effective national policies and programs in a given sector or area of development disaster preparedness, emergency response or rehabilitation.	MO activities have made a substantial contribution to either re-orienting or sustaining effective national policies and programs in a given sector or area of development disaster preparedness, emergency response or rehabilitation. Further, the supported policies and program implementation modalities are expected to result in improved positive impacts for target group members.

Criteria	(1) Highly Unsatisfactory	(2) Unsatisfactory	(3) Satisfactory	(4) Highly Satisfactory
<b>2. Cross Cutting Themes: Inclusive Development Which can be Sustained</b>				
2.1 Extent MO supported activities effectively address the cross-cutting issue of gender equality.	MO supported activities are unlikely to contribute to gender equality or may in fact lead to increases in gender inequalities.	MO supported activities either lack gender equality objectives or achieve less than half of their stated gender equality objectives. (Note: where a program or activity is clearly gender-focused (maternal health programming for example) achievement of more than half its stated objectives warrants a satisfactory rating).	MO supported programs and projects achieve a majority (more than 50%) of their stated gender equality objectives.	MO supported programs and projects achieve all or nearly all of their stated gender equality objectives.
2.2 Extent changes are environmentally sustainable.	MO supported programs and projects do not include planned activities or project design criteria intended to promote environmental sustainability. In addition changes resulting from MO supported programs and projects are not environmentally sustainable.	MO supported programs and projects do not include planned activities or project design criteria intended to promote environmental sustainability. There is, however, no direct indication that project or program results are not environmentally sustainable. OR MO supported programs and projects include planned activities or project design criteria intended to promote sustainability but these have not been successful.	MO supported programs and projects include some planned activities and project design criteria to ensure environmental sustainability. These activities are implemented successfully and the results are environmentally sustainable.	MO supported programs and projects are specifically designed to be environmentally sustainable and include substantial planned activities and project design criteria to ensure environmental sustainability. These plans are implemented successfully and the results are environmentally sustainable.



Criteria	(1) Highly Unsatisfactory	(2) Unsatisfactory	(3) Satisfactory	(4) Highly Satisfactory
<b>3. Sustainability</b>				
3.1 Benefits continuing or likely to continue after project or program completion or there are effective measures to link the humanitarian relief operations, to rehabilitation, reconstructions and, eventually, to longer-term developmental results.	There is a very low probability that the program/project will result in continued intended benefits for the target group after project completion. For humanitarian relief operations, the evaluation finds no strategic or operational measures to link relief, to rehabilitation, reconstruction and, eventually, to development.	There is a low probability that the program/project will result in continued benefits for the target group after completion. For humanitarian relief operations, efforts to link the relief phase to rehabilitation, reconstruction and, eventually, to development are inadequate. (Note, in some circumstances such linkage may not be possible due to the context of the emergency. If this is stated in the evaluation, a rating of satisfactory can be given)	Likely that the program or project will result in continued benefits for the target group after completion. For humanitarian relief operations, the strategic and operational measures to link relief to rehabilitation, reconstruction and, eventually, development are credible.	Highly likely that the program or project will result in continued benefits for the target group after completion. For humanitarian relief operations, the strategic and operational measures to link relief to rehabilitation, reconstruction and, eventually, development are credible. Further, they are likely to succeed in securing continuing benefits for target group members.
3.2 Extent MO supported projects and programs are reported as sustainable in terms of institutional and/or community capacity.	The design of MO supported programs and projects failed to address the need to strengthen institutional and/or community capacity as required. In the case of humanitarian operations, the design of programs and projects failed to take account of identified needs to strengthen local capacities for delivery of relief operations and/or for managing the transition to rehabilitation and/or development.	MO programs and projects may have failed to contribute to strengthening institutional and/or community capacity or, where appropriate, to strengthen local capacities for delivery of relief operations and/or for managing the transition to rehabilitation and/or development.	MO programs and projects may have contributed to strengthening institutional and/or community capacity but with limited success.	Either MO programs and projects have contributed to significantly strengthen institutional and/or community capacity as required or institutional partners and communities already had the required capacity to sustain program results.

Criteria	(1) Highly Unsatisfactory	(2) Unsatisfactory	(3) Satisfactory	(4) Highly Satisfactory
<p>3.3 Extent MO development programming contributes to strengthening the enabling environment for development.</p>	<p>For development programs, there were important weaknesses in the enabling environment for development (the overall framework and process for national development planning; systems and processes for public consultation and for participation by civil society in development planning; governance structures and the rule of law; national and local mechanisms for accountability for public expenditures, service delivery and quality; and necessary improvements to supporting structures such as capital and labour markets). Further, the MO activities and support provided to programs and projects failed to address the identified weakness successfully, further limiting program results.</p>	<p>MO development activities and/or MO supported projects and programs have not made a notable contribution to changes in the enabling environment for development.</p>	<p>MO development activities and/or MO supported projects and programs have made a notable contribution to changes in the enabling environment for development including one or more of: the overall framework and process for national development planning; systems and processes for public consultation and for participation by civil society in development planning; governance structures and the rule of law; national and local mechanisms for accountability for public expenditures, service delivery and quality; and necessary improvements to supporting structures such as capital and labour markets.</p>	<p>MO development activities and/or MO supported projects and programs have made a significant contribution to changes in the enabling environment for development including one or more of: the overall framework and process for national development planning; systems and processes for public consultation and for participation by civil society in development planning; governance structures and the rule of law; national and local mechanisms for accountability for public expenditures, service delivery and quality; and necessary improvements to supporting structures such as capital and labour markets. Further, these improvements in the enabling environment are leading to improved development outcomes.</p>

Criteria	(1) Highly Unsatisfactory	(2) Unsatisfactory	(3) Satisfactory	(4) Highly Satisfactory
<b>4. Relevance</b>				
4.1 MO supported programs and projects are suited to the needs and/or priorities of the target group	Substantial elements of program or project activities and outputs were unsuited to the needs and priorities of the target group.	No systematic analysis of target group needs and priorities took place during the design phase of developmental or relief and rehabilitation programming or there is some evident mismatch between program and project activities and outputs and the needs and priorities of the target group.	MO supported activity, program or project is designed taking into account the needs of the target group as identified through a process of situation or problem analysis (including needs assessment for relief operations) and the resulting activities are designed to meet the needs of the target group.	Methods used in program and project development (including needs assessment for relief operations) to identify target group needs and priorities (including consultations with target group members) and the program and project takes those needs into account and is designed to meet those needs and priorities (whether or not it does so successfully).
4.2 MO supported development projects and programs align with national development goals:	Significant elements of MO supported development program and project activity run counter to national development priorities with a resulting loss of effectiveness.	<u>Significant portion</u> (1/4 or more) of the MO supported development programs and projects are not aligned with national plans and priorities, but there is no evidence that they run counter to those priorities.	<u>Most</u> MO supported development programs and projects are fully aligned with national plans and priorities as expressed in national poverty eradication and sector plans and priorities. Wherever MO supported programs and projects are reported in the evaluation as not directly supportive of national plans and priorities they do not run counter to those priorities.	<u>All</u> MO supported development projects and programs are reported in the evaluation to be fully aligned with national development goals as described in national and sector plans and priorities, especially including the national poverty eradication strategy and sector strategic priorities.

Criteria	(1) Highly Unsatisfactory	(2) Unsatisfactory	(3) Satisfactory	(4) Highly Satisfactory
4.3 MO has developed an effective partnership with governments, bilateral and multilateral development and humanitarian organizations and NGOs for planning, coordination and implementation of support to development and/or emergency preparedness, humanitarian relief and rehabilitation efforts.	MO experiences significant divergence in priorities from those of its (government, NGO or donor) partners and lacks a strategy or plan which will credibly address the divergence and which should result in strengthened partnership over time.	MO has experienced significant difficulties in developing an effective relationship with partners and that there has been significant divergence in the priorities of the MO and its partners.	MO has improved the effectiveness of its partnership relationship with partners over time during the evaluation period and that this partnership was effective at the time of the evaluation or was demonstrably improved.	MO has consistently achieved a high level of partnership during the evaluation period.
<b>5. Efficiency</b>				
5.1 Program activities are evaluated as cost/resource efficient:	Credible information indicating that MO supported programs and projects (development, emergency preparedness, relief and rehabilitation) are not cost/resource efficient.	MO supported programs and projects under evaluation (development, emergency preparedness, relief and rehabilitation) do not have credible, reliable information on the costs of activities and inputs and therefore the evaluation is not able to report on cost/resource efficiency. OR MO supported programs and projects under evaluation present mixed findings on the cost/resource efficiency of the inputs.	Level of program outputs achieved (development, emergency preparedness, relief and rehabilitation) when compared to the cost of program activities and inputs are appropriate even when the program design process did not directly consider alternative program delivery methods and their associated costs.	MO supported (development, emergency preparedness, relief and rehabilitation) programs and projects are designed to include activities and inputs that produce outputs in the most cost/resource efficient manner available at the time.

Criteria	(1) Highly Unsatisfactory	(2) Unsatisfactory	(3) Satisfactory	(4) Highly Satisfactory
5.2 Evaluation indicates implementation and objectives achieved on time (given the context, in the case of humanitarian programming)	Less than half of stated output and outcome level objectives of MO supported programs and projects are achieved on time, there is no credible plan or legitimate explanation found by the evaluation which would suggest significant improvement in on-time objectives achievement in the future.	Less than half of stated output and outcome level objectives of MO supported programs and projects are achieved on time but the program or project design has been adjusted to take account of difficulties encountered and can be expected to improve the pace of objectives achievement in the future. In the case of humanitarian programming, there was a legitimate explanation for the delays.	More than half of stated output and outcome level objectives of MO supported programs and projects are achieved on time and that this level is appropriate to the context faced by the program during implementation, particularly for humanitarian programming.	Nearly all stated output and outcome level objectives of MO supported programs and projects are achieved on time or, in the case of humanitarian programming, a legitimate explanation for delays in the achievement of some outputs/outcomes is provided.
5.3 Evaluation indicates that MO systems and procedures for project/program implementation and follow up are efficient (including systems for engaging staff, procuring project inputs, disbursing payment, logistical arrangements etc.)	Serious deficiencies in agency systems and procedures for project/program implementation that result in significant delays in project start-up, implementation or completion and/or significant cost increases.	Some deficiencies in agency systems and procedures for project/program implementation but does not indicate that these have contributed to delays in achieving project/program objectives.	Agency systems and procedures for project implementation are reasonably efficient and have not resulted in significant delays or increased costs.	Efficiency of agency systems and procedures for project implementation represent an important organizational strength in the implementation of the program under evaluation.

Criteria	(1) Highly Unsatisfactory	(2) Unsatisfactory	(3) Satisfactory	(4) Highly Satisfactory
<b>6. Using Evaluation and Monitoring to Improve Development Effectiveness</b>				
6.1 Systems and process for evaluation are effective.	Evaluation practices in use for programs and projects of this type (development, emergency preparedness, relief and rehabilitation) are seriously deficient.	No indication that programs and projects of this type (development, emergency preparedness, relief and rehabilitation) are subject to systematic and regular evaluations.	Program being evaluated is subject to systematic and regular evaluations or describes significant elements of such practice. No mention of policy and practice regarding similar programs and projects. This may include specialized evaluation methods and approaches to emergency preparedness, relief and rehabilitation programming.	Program being evaluated (along with similar programs and projects) is subject to systematic regular evaluations or describes significant elements of such practice.
6.2 Systems and processes for monitoring and reporting on program results are effective	Absence of monitoring and reporting systems for the development and humanitarian programming. This would include the absence of adequate monitoring of outputs during the implementation of humanitarian programming.	While monitoring and reporting systems for the development and humanitarian programming exist, they either do not report on a regular basis or they are inadequate in frequency, coverage or reliability.	Monitoring and reporting systems for development and humanitarian programming as appropriate are well-established and report regularly.	Monitoring and reporting systems for the program are well-established and report regularly. The quality of regular reports is rated highly by the evaluation and results are reportedly used in the management of the program.
6.3 Results Based Management (RBM) systems are effective	No evidence of the existence of an RBM system for the program and no system is being developed.	While an RBM system is in place, or being developed, it is unreliable and does not produce regular reports on program performance.	RBM system is in place and produces regular reports on program performance.	RBM system is in place for the program and there is evidence noted in the evaluation that the system is used to make changes in the program to improve effectiveness.

Criteria	(1) Highly Unsatisfactory	(2) Unsatisfactory	(3) Satisfactory	(4) Highly Satisfactory
6.4 MO makes use of evaluation to improve development/humanitarian effectiveness	Report does not include a management response and does not have one appended to it or associated with it. There is no indication of how the evaluation results will be used. There is no indication that similar evaluations have been used to improve effectiveness in the past.	Report includes a management response (or has one attached or associated with it) but it does not indicate which recommendations have been accepted.  OR  There is some, non-specific indication that similar evaluations have been used to improve program effectiveness in the past.	Report includes a management response (or has one attached or associated with it) that indicates which recommendations have been accepted.  OR  There is a clear indication that similar evaluations in the past have been used to make clearly identified improvements in program effectiveness.	Report includes a management response (or has one attached or associated with it) describes a response to each major recommendation which is appropriate and likely to result in the organizational and programmatic changes needed to achieve their intent.

## Annex 6: Corporate Documents Reviewed

Documents consulted		
Year	Title	Type
<b>Strategies</b>		
2010	Report on the Ninth General Increase in the Resources of the Inter-American Development Bank	Strategies
N/A	Strategy on Social Policy for Equity and Productivity	Strategies
2011	Sector Strategy Institutions for Growth and Social Welfare	Strategies
N/A	Sector Strategy to Support Competitive Global and Regional Integration	Strategies
<b>IDB Development Effectiveness Reports and Other Reports</b>		
2014	Development Effectiveness Overview 2013	Development Effectiveness Reports
2013	Development Effectiveness Overview 2012	Development Effectiveness Reports
2012	Development Effectiveness Overview 2011	Development Effectiveness Reports
2011	Development Effectiveness Overview 2010	Development Effectiveness Reports
2010	Development Effectiveness Overview 2009	Development Effectiveness Reports
2012	2011 COMPAS Report. Multilateral Development Banks' Common Performance Assessment System	Other Reports
2011	Multilateral Development Banks' Common Performance Assessment System. 2010 Report	Other Reports
2010	Multilateral Development Banks' Common Performance Assessment System. 2009 COMPAS Report	Other Reports
2009	Multilateral Development Banks' Common Performance Assessment System. COMPAS 2008 Report	Other Reports
2011	Multilateral Organisation Performance Assessment Network. Organisational Effectiveness Assessment. Inter-American Development Bank (IDB). Volume I	Other Reports
<b>Corporate Evaluations</b>		
2013	How is the IDB Serving Higher-Middle-Income Countries?: Borrowers' Perspective	Corp
2013	IDB-9 Survey: Overview of the Results	Corp
2013	IDB-9: Access to Information	Corp
2013	IDB-9: Assessment of IDB-9's Private Sector Development Framework	Corp



Documents consulted		
Year	Title	Type
2013	IDB-9: Assessment of the Social Strategy for Equity and Productivity	Corp
2013	IDB-9: Combating Fraud and Corruption	Corp
2013	IDB-9: Competitive Regional and Global International Integration	Corp
2013	IDB-9: Corporate Results Framework	Corp
2013	IDB-9: Country Programming	Corp
2013	IDB-9: Country Systems	Corp
2013	IDB-9: Environmental and Social Safeguards, Including Gender Policy	Corp
2013	IDB-9: Financial and Risk Management	Corp
2013	IDB-9: Human Resources Processes	Corp
2013	IDB-9: IDB Integrated Strategy for Climate Change Adaptation and Mitigation, and Sustainable and Renewable Energy	Corp
2013	IDB-9: Integrated Business Solution: Program Optima	Corp
2013	IDB-9: Knowledge Products	Corp
2013	IDB-9: Lending Instruments	Corp
2013	IDB-9: Macroeconomic Sustainability Assessments	Corp
2013	IDB-9: Operational Performance and Budget	Corp
2013	IDB-9: Review of the IDB Institutions for Growth and Social Welfare Strategy	Corp
2013	IDB-9: The Development Effectiveness Framework and Overview	Corp
2012	Evaluation of the Fund for Special Operations during the Eighth Replenishment (1994-2010): Part II	Corp
2012	Evaluation of the Independent Consultation and Investigation Mechanism (ICIM)	Corp
2012	Evaluation of the Opportunities for the Majority Initiative	Corp
2012	Implementation of the Strategy for Indigenous Development (GN-2387-5): Lessons from the Portfolio Review	Corp
2012	Mid-term Evaluation of IDB-9 Commitments: Overview	Corp
2011	An Evaluation of One Pillar of the IDB's Knowledge and Learning Strategy: Training Activities for IDB Operations Staff	Corp
2011	An Evaluation of the Bank's Non-Sovereign Operations with Sub-National Entities: 2007-2010	Corp
2011	Oversight Note on Credit Risk Management	Corp
2011	Self-Evaluation of OVE's Work: 2001-2010	Corp
2010	Evaluation of the Bank's Processes for Managing Technical Cooperation	Corp

Documents consulted		
Year	Title	Type
2010	Evaluation of the Fund for Special Operations during the Eighth Replenishment (1994-2010): Part I	Corp
2010	Is Gender Being Mainstreamed in Bank's Projects?	Corp
2010	The Country Studies Initiative and its Effect on the Bank's Knowledge Strategy	Corp
2009	Evaluation Findings Regarding IDB-8 Guidance and Implications for Future Capital Increase Agreements	Corp
2009	Evaluation of the Quality of Economic Analysis for Projects Approved 1997-2006	Corp
2008	The Evaluation of the New Lending Framework (2005-2008)	Corp
<b>Sector and Thematic Evaluations</b>		
2011	OVE's Environmental Performance Review applied to the Energy Sector	Sec&Them
2011	Thematic Note: The Challenge of Integrated Watershed Management: Analysis of the Bank's Actions in Watershed Management Programs 1989-2010	Sec&Them
2010	Do we know if the Bank's pro-poor projects benefit the poor?	Sec&Them
2008	Evaluation of the IDB's Role in the Fiscal Sector	Sec&Them