



Republic of the Philippines
National Economic and Development Authority and
Department of Budget and Management

Joint Memorandum Circular No. 2025-OI
April 14, 2025

FOR : All Heads of Departments, Bureaus, Offices, and Agencies of the National Government, including Commissions, State Universities and Colleges (SUCs), Government-owned or -Controlled Corporations (GOCCs), Government Financial Institutions (GFIs), and Other Instrumentalities of the Government

SUBJECT : REVISED NATIONAL EVALUATION POLICY FRAMEWORK OF THE PHILIPPINES

1.0 RATIONALE

Over the years, the National Economic and Development Authority (NEDA) and the Department of Budget and Management (DBM) have implemented various reform initiatives to enhance the integration of planning, budgeting, and monitoring and evaluation. These initiatives include the Official Development Assistance (ODA) Portfolio Review, Regional Project Monitoring and Evaluation System, Medium-Term Expenditure Framework, Organizational Performance Indicator Framework, Sector Efficiency and Effectiveness Review, and the Program Expenditure Classification. These efforts were further supported by key policy measures, including Executive Order (EO) No. 376, s. 1989¹, EO No. 93, s. 1993², and Republic Act (RA) No. 8182 or the ODA Act of 1996³, as amended by RA No. 8555. Collectively, these reforms aimed to promote results-oriented planning and governance.

Despite these advancements, a critical gap persists: no existing policy explicitly mandates the systematic generation of evaluation evidence to determine whether government programs and projects achieve their intended outcomes and impacts. This gap underscores the need for a cohesive framework that ensures accountability, promotes evidence-based decision-making, and facilitates learning across public sector agencies.

¹ Establishing the Regional Project Monitoring and Evaluation System, Setting Forth its Objectives, Defining its Scope and Coverage, Requiring the Formulation of a Manual of Operations and for other Similar Purposes

² Amending Executive Order No. 376 (series of 1989) "Establishing the Regional Project Monitoring and Evaluation System" and for Other Purposes

³ An Act Excluding Official Development Assistance (ODA) from the Foreign Debt Limit in Order to Facilitate the Absorption and Optimize the Utilization of ODA Resources, Amending for the Purpose Paragraph 1, Section 2 of Republic Act No. 4860, as Amended.

The National Evaluation Policy Framework (NEPF), introduced through NEDA-DBM Joint Memorandum Circular No. 2015-01 on July 1, 2015, established an initial foundation for systematic evaluations of government programs and projects. However, its implementation revealed gaps that must be addressed to better align the framework with evolving governance priorities and challenges.

The revisions to the NEPF aim to refine its scope, optimizing limited resources while enhancing accountability and supporting evidence-based decision-making. The revisions also incorporate internationally-recognized principles to ensure that evaluations address relevance, coherence, effectiveness, efficiency, impact, and sustainability of government programs and projects.

The revised NEPF seeks to strengthen the government's ability to generate actionable insights, guide resource allocation, and improve program and project outcomes. It promotes the principle of good governance by fostering transparency, accountability, and a culture of continuous learning across public sector agencies. Ultimately, the revised NEPF supports the effective implementation of the Philippine Development Plan (PDP) and ensures that government initiatives contribute meaningfully to national development goals.

2.0 PURPOSE

This Joint Memorandum Circular establishes a policy framework for systematic evaluations in the public sector, promoting good governance, transparency, accountability, and evidence-based decision-making. Specifically, it aims to:

- (a.) Institutionalize the governance structure for public sector evaluations by defining roles, responsibilities, and coordination mechanisms among members of the NEPF Steering Committee, implementing agencies, and other stakeholders;
- (b.) Guide the formulation of the National Evaluation Agenda to identify priority government programs and projects for evaluation, ensuring alignment with national development priorities and decision-making processes; and
- (c.) Mandate the development and submission of Agency-Based Evaluation Agendas to provide a structured approach for agencies in planning, conducting, and utilizing evaluations. This includes specifying submission timelines, oversight responsibilities, and mechanisms for monitoring and updating these agendas in line with the policy framework.

A detailed procedural requirements shall be developed and issued separately by the NEPF Steering Committee to ensure flexibility and responsiveness to evolving governance needs.

3.0 COVERAGE

This Joint Memorandum Circular covers all Departments, Bureaus, Offices, and Agencies of the National Government, including Commissions, SUCs, GOCCs, GFIs, and other instrumentalities of the government that receive budgetary support from the National Government, including those maintaining special accounts in the General Fund.

4.0 DEFINITION OF TERMS

For the purpose of this revised NEPF, the following terms are defined as follows:

- a. Activity – the specific actions, tasks, or interventions that are implemented to produce outputs and achieve intended outcomes or impacts. Activities are the building blocks of a program or project, representing what is done to translate resources into measurable results.
- b. Evaluation – the systematic process of assessing the design, implementation, and outcomes of an intervention to determine its effectiveness, efficiency, relevance, and sustainability. Evaluation seeks to provide evidence on whether and how an intervention has achieved its intended results, what factors contributed to its success or failure, and how future efforts can be improved.
- c. Types of evaluations – categorized by timing, function or positionality, this Joint Memorandum Circular covers the following:
 - (i.) Process evaluation – a type of evaluation that focuses on understanding the implementation of an intervention, examining how the activities are carried out and whether they align with the planned procedures. It evaluates the quality, fidelity, and effectiveness of the implementation process rather than the final outcomes. Process evaluation helps identify any challenges faced during execution, gaps in the delivery, and whether the intervention is being implemented as intended. It also provides insight into how the intervention's activities contribute to achieving the desired results.
 - (ii.) Impact evaluation – a type of evaluation that focuses on assessing the changes resulting from an intervention. It aims to determine whether these changes can be directly attributed to the intervention itself, distinguishing between what happened because of the intervention and what might have occurred otherwise. Impact evaluations often use comparison groups to measure the differences between those exposed to the intervention and those who were not. This evaluation type provides crucial insights into the effectiveness of interventions, offering evidence on what works and why.
 - (iii.) Other types of evaluation – detailed guidelines will be issued by the NEPF Steering Committee to comprehensively discuss the other types of evaluation.
- d. Evaluation Plan – outlines the scope, objectives, key questions and other elements that should guide the evaluation of the intervention. It also includes how the evaluation will be carried out, particularly the person/s responsible for managing and carrying out the evaluation, methods for data gathering, analysis of data, and reporting or use of results. Likewise, it incorporates specific timelines as well as the resources needed for the implementation of the evaluation.
- e. Impact – the broader and long-term changes that occur as a result of an intervention or program, which may include intended and unintended, positive and negative effects. Impact

is often associated with the ultimate goals of an intervention, such as improvements in well-being, societal change, or environmental sustainability.

- f. **Intervention** – for the purpose of this Joint Memorandum Circular, interventions refer specifically to government programs or projects, including those supported by local and/or foreign funds. These involve a planned set of activities, strategies, or initiatives designed to address a defined problem or bring about a desired change. Interventions are implemented to deliver outputs, achieve outcomes, and contribute to broader impacts. They serve as the primary means by which resources (e.g., time, funding, personnel) are mobilized and translated into concrete actions to meet specific development objectives.
- g. **Outcome** – the short-term and medium-term changes or effects that result from the implementation of activities and outputs. Outcomes indicate progress toward achieving broader impacts and reflect changes in behavior, knowledge, skills, attitudes, systems, or conditions that occur as a result of an intervention.
- h. **Output** – the immediate, tangible, and measurable products, services, or deliverables produced by an intervention. Outputs result directly from the activities implemented and are necessary precursors to achieving broader outcomes and impacts.
- i. **Results** – the measurable outcomes, impacts, or effects of a program, project, or policy that are assessed to determine its effectiveness and relevance.

5.0 IMPLEMENTING FRAMEWORK AND INSTITUTIONAL STRUCTURE

5.1 Development and Issuance of Evaluation Agenda

To operationalize the revised NEPF, the following evaluation agenda shall be formulated:

5.1.1 National Evaluation Agenda – outlines priority programs and projects identified for evaluation over a rolling six-year period, authorized or commissioned by the NEPF Steering Committee. It may include select priority programs and projects from Department/Agency Evaluation Agendas submitted to the NEPF Steering Committee.

In general, impact evaluations shall be prioritized under this agenda to assess the progress and effectiveness of key programs and projects. However, process evaluations may also be undertaken for critical projects, as deemed necessary by the NEPF Steering Committee.

The National Evaluation Agenda plays a key role in (i) informing further articulation and implementation of the PDP; (ii) conveying progress achieved in priority investment areas; (iii) promoting transparency and accountability in public sector management; and (iv) supporting the formulation and updating of the PDP.

5.1.2 Department/Agency Evaluation Agenda – outlines an agency's priority programs and projects for evaluation, ensuring continuous service improvement in support of its mandate and functions.

Process evaluations shall generally be used by implementing agencies to assess the efficiency and effectiveness of program and project management. Impact evaluations and other types of evaluations may be conducted for specific programs and projects, as deemed necessary by the agency.

To ensure impartiality and objectivity in evaluations, each implementing agency may establish, designate, or enhance an evaluation unit that is separate and independent from its implementing units. The evaluation unit shall be responsible for overseeing and managing evaluations, without undue influence from managers or other stakeholders involved in program or project implementation. This separation upholds the principles outlined in Annex E: Impartiality.

The NEPF Steering Committee shall issue separate guidelines on the formulation of both evaluation agendas, ensuring alignment with the PDP, the Public Investment Program, and the Results Matrix.

5.2 Roles and Responsibilities

The operationalization of the revised NEPF will be undertaken by the following entities:

5.2.1 Steering Committee

The Evaluation Task Force (ETF) shall be reconstituted and renamed as the NEPF Steering Committee. The Secretaries of NEDA and DBM shall act as Chairperson and Co-Chairperson of the NEPF Steering Committee, respectively. The Head of the Office of the President–Presidential Management Staff (OP-PMS) shall also serve as a member of the Steering Committee. The NEPF Steering Committee may designate additional voting members (e.g., other government agencies) and special non-voting members (e.g., representatives from civil society, the academe, or the private sector) as may be necessary.

Among the responsibilities of the NEPF Steering Committee are:

- a. Provide overall policy direction and coordination on evaluation in the public sector;
- b. Report to NEDA Board or the concerned NEDA Board Inter-Agency Committee the results of evaluation studies, as may be deemed necessary and relevant;
- c. Formulate and issue the National Evaluation Agenda;
- d. Authorize and commission/conduct impact evaluations on top of those conducted by the implementing agencies;
- e. Issue evaluation standards and guidelines;

- f. Promote the utilization of evaluation results in the performance of the member agencies' functions; and
- g. Recommend incentive schemes, awards and recognition within existing government policies and processes to encourage the wider and more effective use of evaluation results.

The NEPF Steering Committee shall meet as often as necessary but not less than once a semester.

5.2.2 Technical Committee

The NEPF Steering Committee may authorize the creation of a sub-cabinet-level Technical Committee composed of representatives—at least at the level of Assistant Secretary or equivalent—from NEDA, DBM, OP-PMS, the Development Academy of the Philippines (DAP), the Philippine Institute for Development Studies (PIDS), the Philippine Statistical Research and Training Institute (PSRTI), the Philippine Statistics Authority (PSA), and representative(s) from the academe.

As the technical arm of the NEPF Steering Committee, the Technical Committee shall support the implementation of the revised NEPF by performing the following functions:

- a. Facilitate technical discussions on agenda items for NEPF Steering Committee meetings;
- b. Review and recommend policies, strategies, standards, and guidelines developed by the NEPF Secretariat to ensure effective implementation of the revised NEPF;
- c. Review and endorse the National Evaluation Agenda, as prepared by the Evaluation Secretariat, for approval by the NEPF Steering Committee;
- d. Review and endorse the rolling six-year evaluation agenda of implementing agencies to the NEPF Steering Committee;
- e. Review consolidated reports on impact evaluation studies and submit findings to the NEPF Steering Committee for endorsement;
- f. Assist in the capacity development efforts to strengthen evaluation competencies across agencies; and
- g. Coordinate budgetary and donor funding to support the implementation of the National Evaluation Agenda.

5.2.3 Secretariat

The Evaluation Secretariat shall provide technical secretariat support to the NEPF Steering and Technical Committees by performing the following functions:

- a. Recommend policies, strategies, and guidelines to the NEPF Technical Committee for the effective implementation of the NEPF;

REVISED NATIONAL EVALUATION POLICY FRAMEWORK OF THE PHILIPPINES

- b. Formulate the National Evaluation Agenda for endorsement to the NEPF Technical Committee for review and subsequent approval by the NEPF Steering Committee;
- c. Prescribe the format and content of the rolling six-year evaluation agenda and evaluation plan for implementing agencies;
- d. Monitor and report progress and results of significant evaluation studies undertaken by implementing agencies;
- e. Monitor and report the management response and follow through action of impact evaluation studies undertaken by the Evaluation Secretariat;
- f. Conduct an orientation and training program on the adoption of the revised NEPF for relevant personnel of departments/agencies;
- g. Conduct capacity development activities with the assistance of the members of the NEPF Technical Committee to support the operationalization of the revised NEPF;
- h. Conduct/manage evaluation as authorized by the NEPF Steering Committee;
- i. Formulate criteria for evaluations to be endorsed for NEPF Steering Committee approval; and
- j. Prepare a consolidated report of individual impact evaluation studies (and select/relevant evaluation studies) for consideration of the NEPF Steering Committee (and/or the Technical Committee).

The Evaluation Secretariat shall be supported with adequate resources, subject to the budgetary processes and availability of funds, to be able to comply with the provisions of this revised NEPF.

NEDA, through its Monitoring and Evaluation Staff (MES), shall serve as the Evaluation Secretariat.

5.2.4 Departments/Agencies

Implementing agency heads may establish, designate, or enhance a capable independent evaluation unit as necessary, subject to existing DBM policies, rules, and regulations on organizational and staffing pattern changes. The designated evaluation unit may be an existing unit within the agency or a newly established one, and shall be tasked with conducting or commissioning evaluation studies for the agency's programs and projects. It is recommended that the head of the evaluation unit report directly to the implementing agency head or governing body to ensure impartiality and credibility of evaluation results.

Responsibilities of the designated evaluation unit include the following:

- a. Formulation of the department/agency evaluation agenda and submission to the implementing agency head for approval;
- b. Formulation of evaluation plans contained in program or project proposals;

REVISED NATIONAL EVALUATION POLICY FRAMEWORK OF THE PHILIPPINES

- c. Conduct/management of evaluation studies ensuring that they are undertaken with due regard for impartiality and in line with the evaluation best practices;
- d. Facilitate the preparation of management responses and tracking follow-up actions for completed evaluation studies;
- e. Management of the agency's evaluation budget and related activities;
- f. Submission of findings and recommendations of evaluation activities to the implementing agency head;
- g. Ensure appropriate management response, including follow through actions by concerned units to evaluation findings and recommendations;
- h. Ensure that results of evaluation are used as inputs to planning and budgeting processes, subsequent design of similar programs and projects, and periodic review and assessment of the efficiency and effectiveness of the agency programs/activities/projects;
- i. Timely publication of all evaluation reports on the implementing agency's public website covering all evaluated programs and projects;
- j. Submission of evaluation reports to the NEPF Steering Committee in accordance with prescribed guidelines; and
- k. Serve as a repository of all evaluation studies conducted/commissioned.

Implementing agencies shall endeavor to allocate in their annual budgets adequate resources to ensure compliance with the provisions of this revised NEPF. This includes funds for:

- a. Capacity development during the start-up phase of the revised NEPF;
- b. Ongoing salaries, recruitment and training to ensure an adequate supply of internal personnel competent in evaluation;
- c. Operations and maintenance; and
- d. External professional service fees, as applicable.

6.0 GUIDING PRINCIPLES IN THE CONDUCT OF EVALUATION

All programs and projects aligned with the PDP that are implemented by the above-mentioned entities and supported by local and/or foreign funds are considered for evaluation as necessary and feasible. This includes programs and projects executed by civil society organizations and other third parties under contract with a Government implementing agency. However, programs and projects fully supported by national government funds shall be prioritized for evaluations using government resources.

Program or project proposals that are critical to implementing agencies' sectoral objectives put forward for annual budgeting shall include an evaluation plan in accordance with the best practices. The program or project proponent shall take into consideration results of previous evaluation of similar programs or projects and make reference to relevant evaluation findings, recommendations, and resulting changes to the proposed program or project.

In addition, evaluations shall be guided by the following:

- a. Evaluations should apply the following criteria to address the key questions needed to assess an intervention (see also **Annex A**):
 - i. *Relevance* (on the extent to which the intervention aligns with the needs, priorities, and policies of beneficiaries and stakeholders; remains pertinent amid changing circumstances; and considers alternative approaches to achieve intended outcomes)
 - ii. *Coherence* (on internal coherence, or the consistency between different elements within the intervention, and external coherence, or the alignment and synergies with other interventions, policies, and frameworks)
 - iii. *Effectiveness* (on the extent to which the intervention achieves its objectives, including any unintended results, and the timeliness of the achieved outcomes)
 - iv. *Efficiency* (on how economically resources and inputs are converted into outputs and outcomes, considering alternative methods that could have achieved similar results with less resource utilization)
 - v. *Impact* (on the positive or negative, primary or secondary long-term effects produced by the intervention, directly or indirectly, intended or unintended)
 - vi. *Sustainability* (on the likelihood that the benefits of the intervention will continue after major development assistance has been completed, considering factors such as institutional capacity, stakeholder ownership, and resource availability)
- b. Ensuring evaluation competencies (see also **Annex B**);
- c. Ensuring the use of rigorous methodologies and upholding the robustness of results and evidence throughout the evaluation process;
- d. Observing standards of ethics in undertaking evaluations (see also **Annex C**);
- e. Preparing evaluation plans in accordance with best practices (see also **Annex D**);
- f. Undertaking evaluations with due regard for impartiality (see also **Annex E**); and
- g. Reporting, dissemination, and use of evaluations (see also **Annex F**).

The NEPF Steering Committee may issue additional directives as may be deemed necessary.

7.0 UTILIZATION OF EVALUATIONS

7.1 Communicating Results

The NEPF Steering Committee shall ensure that the results of impact evaluation studies are effectively disseminated and communicated to relevant oversight, planning, and budgeting agencies, as well as to legislative bodies, when required. Moreover, the evaluation results shall be made publicly available for transparency and accountability.

7.2 Management Response

The NEPF Steering Committee shall facilitate the development and implementation of appropriate management responses, including follow-up actions by the concerned agencies or units, to address the findings and recommendations of evaluation studies.

7.3 Link to Planning and Budgeting

The NEDA and DBM, as Chairperson and Co-Chairperson of the NEPF Steering Committee, shall utilize the results of evaluation studies to (i) inform and strengthen their respective planning and budgeting processes; and (ii) serve as input to Agency Performance Review (APR) process providing objective evidence to aid in better programs/activities/projects (PAPs) performance. The NEPF Steering Committee shall endorse the findings of its commissioned evaluation studies to the PDP Planning Committees, APR leads of agencies⁴, and other relevant oversight bodies to ensure their practical application in policy formulation, resource allocation, and decision-making.

8.0 INSTITUTIONAL AND LEGISLATIVE ADJUSTMENTS

In the event of institutional or legislative changes affecting the mandates, roles, or oversight functions of agencies referenced in this Joint Memorandum Circular, all corresponding responsibilities, structures, and implementation mechanisms shall be adjusted accordingly to align with the new governance framework. The provisions of this Joint Memorandum Circular shall be interpreted and applied in a manner consistent with the updated legal and institutional mandates to ensure the continued implementation of evaluation functions, policies, and processes.

9.0 SEPARABILITY CLAUSE

The provisions of this Joint Memorandum Circular are hereby declared separable and if any clause, sentence, provision or section hereof should be declared invalid, such invalidity shall not affect the other provisions of this Joint Memorandum Circular.

10.0 POLICY FRAMEWORK AMENDMENT

This Joint Memorandum Circular shall be subject to review by the NEPF Steering Committee every five (5) years, or earlier as necessary, to ensure its continued relevance and responsiveness to emerging policy and implementation issues. Any amendments to this Circular shall be approved by the NEPF Steering Committee and issued through an appropriate issuance.

11.0 REPEALING CLAUSE

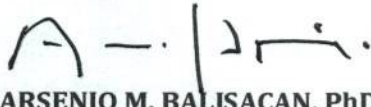
This Joint Memorandum Circular supersedes NEDA-DBM Joint Memorandum Circular No. 2015-01, also known as the National Evaluation Policy Framework. All other policies and issuances or parts thereof inconsistent with the revised National Evaluation Policy Framework are hereby repealed or amended accordingly.

12.0 EFFECTIVITY

This Joint Memorandum Circular shall take effect immediately.

⁴ In line with the implementation of Circular Letter No. 2025-2: Guidelines for the Conduct of Agency Performance Reviews (APR) Covering Fiscal Year (FY) 2024 and Years Thereafter

REVISED NATIONAL EVALUATION POLICY FRAMEWORK OF THE PHILIPPINES



ARSENIO M. BALISACAN, PhD

Secretary

National Economic and Development Authority



AMENA F. PANGANDAMAN

Secretary

Department of Budget and Management

ANNEX A: EVALUATION CRITERIA

The evaluation criteria listed herein are drawn from internationally-accepted criteria as prescribed by evaluation organizations (i.e., OECD-DAC and UNEG) and adopted by development institutions (i.e., ADB, WB and JICA).

Evaluations should consider the following questions and identify which of these are relevant to the particular evaluation to be conducted. Additional or different criteria and questions may apply depending on the type of evaluation (e.g., process vs. impact evaluation).

Relevance

1. *Alignment and Consistency with National Priorities and Policies.* To what extent do program or project outcomes/impacts align with the achievement of national priorities and existing laws, including PDP sector outcomes?
2. *Responsiveness to Stakeholder Needs.* To what extent does the program or project address the urgent needs of the stakeholders?
3. *Programmatic Alternatives.* Are there better ways to achieve the program's or project's outcomes/impacts, or to contribute to related national priorities?

Coherence

4. *Compatibility with Other Interventions.* To what extent do other interventions and policies support or undermine the program or project being evaluated, and vice versa?
5. *Complementarity with Existing Programs or Projects.* To what extent does the program or project complement existing programs or projects, resulting in improved outcomes?

Effectiveness

6. *Objectives Achievement.* What intended outputs and outcomes/impacts (short-term outcomes, medium-term outcomes, and long-term impacts) were found, and to what extent can they be attributed to program or project activities?
7. *Unintended Results.* What unintended outputs and outcomes/impacts were found, and to what extent can they be attributed to program or project activities?

Efficiency

8. *Efficient Delivery of Outputs.* Were the activities cost efficient? Was the utilization of resources optimized in terms of the realization of the program or project objective? To what extent was resource utilization minimized in relation to the delivery of outputs?
9. *Operational Alternatives.* Are there better, more efficient ways to deliver program or project outputs?
10. *Timeliness.* Were the objectives achieved on time?

Impact

11. *Observed Effects.* What changes or effects has the program or project brought?

12. *Counterfactual Analysis.* What would have happened if the intervention had not taken place?
13. *Baseline Comparison.* How do the changes fare from the initial state/situation of the beneficiaries?

Sustainability

14. *Continuation of Benefits.* To what extent are the benefits of the program or project likely to continue after external funding or support has ended?
15. *Factors Influencing Sustainability.* What are the key factors—such as institutional capacity, stakeholder ownership, policy support, and resource availability—that have influenced or may influence the sustainability of the program or project outcomes?

ANNEX B: EVALUATION COMPETENCIES

Those engaged in designing, conducting and managing evaluation activities should demonstrate the following competencies:

- *Technical Foundations*: Understands and makes appropriate use of methodological concepts and practices in line with accepted professional evaluation standards. Gathers relevant evidence for evaluation purposes from appropriate sources, assessing its quality and identifying gaps. Analyzes and interprets data fairly, comprehensively and objectively in order to effectively address evaluation questions.
- *Leading, Managing and Delivering Evaluations*: Manages evaluation resources and relationships with stakeholders to deliver high quality evaluations on time and to Government of the Philippines standards.
- *Communicating and Sharing Evaluation Findings*: Communicates effectively orally and in writing in the context of all evaluation activities. Clearly reports evaluation methods, findings, conclusions and recommendations. Promotes awareness and use of evaluations through effective dissemination and advice.
- *Integrity*: Demonstrates honesty and respect in dealing with program or project personnel, other interested Government of the Philippines personnel, and all other evaluation stakeholders.

ANNEX C: ETHICS

1. All those engaged in designing, conducting and managing evaluation activities shall abide by the Code of Conduct and Ethical Standards for Public Officials and Employees (Republic Act No. 6713).
2. Evaluators shall respect the right of implementing agencies and individuals to provide information in confidence, and ensure that sensitive data cannot be traced to its source. Evaluators shall comply with the provisions of Republic Act No. 10173, otherwise known as the Data Privacy Act of 2012, in processing information and data collected in the evaluation process. Evaluators must ensure that those involved in evaluations have the opportunity to review and approve the statements attributed to them.
3. Evaluators shall be sensitive to the cultural, social and economic environment of all stakeholders, and conduct themselves in a manner that is fair and appropriate to this environment.
4. Evaluators shall be accountable for their performance and their products.

ANNEX D: BEST PRACTICES IN EVALUATION

Evaluation Scale

1. Evaluations can range from simple desk reviews to complex studies involving multiple sources of data. In some cases, in addition to a summative evaluation at the end of a project's/program's life cycle or at the five-year point, a formative evaluation is appropriate at the project's/program's mid-point. To ensure that the Policy is carried out with maximum efficiency across the Government, the scale of each evaluation should be large enough to provide timely answers to critical evaluation questions with an adequate level of certainty, but no costlier than necessary. The scale, and associated cost, of every evaluation typically increases in correspondence with the following factors:
 - a. *Level of Ambiguity*: programs or projects whose outcomes are unsure – e.g., new, untried programs or projects;
 - b. *Potential Consequences*: programs or projects whose failure can lead to severe negative consequences;
 - c. *Information Needs*: programs or projects about which decision-makers urgently require information – e.g., programs or projects whose renewal is at stake, or programs or projects with a high public profile;
 - d. *Program or Project Size*: program or project magnitude⁵;
 - e. *Program or Project Complexity*: complexity in terms of such dimensions as number and variation of activities, number and variation of target populations, regional reach, and anticipated difficulty associated with acquiring relevant data; and
 - f. *Uniqueness of Program or Project*: with respect to outputs and outcomes/impacts, the program or project in comparison is unique.

Evaluation Design and Execution

2. Within the defined evaluation scale, evaluations should employ research methodologies in line with accepted professional evaluation practices. Accepted tools, methods and processes include:
 - a. Logic models/change theories that depict key program or project elements – including inputs, activities, intended outputs, short-term outcomes, medium-term outcomes, long-term impacts, related higher-level and national priorities, and the hypothesized causal links among the elements – and support the development of evaluation questions;
 - b. Baseline data and/or ongoing program or project performance data collected to support the evaluation;
 - c. Designs that help establish the extent to which outcomes/impact can be attributed to the program or project including a mix of methods and perspectives – e.g., surveys, interviews and focus groups with a diversity of audiences including program or project participants and stakeholders, literature/document reviews, and administrative data analyses;
 - d. Sampling strategies that provide accurate representation of the populations of interest;
 - e. Research instruments that are valid and reliable;

⁵As the size of a program or project increases, the proportion of its total budget required for the evaluation typically decreases

REVISED NATIONAL EVALUATION POLICY FRAMEWORK OF THE PHILIPPINES

- f. Comprehensive, accurate quantitative and qualitative data analysis strategies, taking into account the context of the program or project, that lead to defensible findings for each evaluation question;
- g. Conclusions drawn from a synthesis of findings;
- h. Recommendations based on the findings and conclusions; and
- i. Evaluation reports and related presentations that are concisely and clearly written such that all audiences can readily grasp key messages, and decision-makers – from program or project managers to senior officials and legislators – can make informed decisions.

ANNEX E: IMPARTIALITY

1. It is the responsibility of the conducting/commissioning unit to ensure that evaluations are conducted with the highest possible degree of impartiality in order to maximize objectivity and minimize the potential for bias. In some cases, it may be appropriate to commission an independent third-party evaluator to undertake portions of, or the entire, evaluation.
2. While their active involvement is typically necessary to effectively conduct an evaluation, managers and other stakeholders of the program or project being evaluated should not be allowed to influence evaluation findings. Good practices involve a constructive mix of internal and external stakeholders so that program knowledge can be brought to bear while potential conflicts of interest can be identified and prevented.

ANNEX F: REPORTING, DISSEMINATION AND USE OF EVALUATIONS

All evaluation reports shall contain:

- Recommendations developed by the evaluator based on the findings; and
- Response from the agency head, describing actions that will be taken in addressing each recommendation.

To ensure transparency, all final evaluation reports shall:

- Describe the evaluated program or project;
- Provide adequate background and context including the purpose of the evaluation and the evaluation issues and questions;
- Describe the evaluation methodology including limitations and the approaches adopted to mitigate limitations;
- Disclose the identities of the principal members of the evaluation team and, if applicable, the evaluation steering committee or other advisory bodies;
- Clearly state evaluation findings along with a description of the evidence on which each finding is based; and
- Clearly distinguish evaluator opinions (e.g., recommendations) from statements of fact (e.g., findings).