2018 MONITORING ROUND

MINI GUIDE

For Development Partners
Bilateral and multilateral development agencies and funds

All materials and tools at:
www.effectivecooperation.org/2018monitoring

For questions & help:
monitoring@effectivecooperation.org
The objective of this mini-guide is to provide development partners with the information necessary to engage in and support partner countries participating in the 2018 monitoring round of the Global Partnership for Effective Development Co-operation (hereafter “the Global Partnership”).

This document provides guidance on the process and methodology of the monitoring exercise, and outlines how to use the results. The deadline for your partner countries to submit data is 31 October 2018. This will allow for findings to inform the Sustainable Development Goals and Financing for Development follow-up and review processes, as well as the Global Partnership Senior-Level Meeting, scheduled to take place in July 2019 in concurrence with the 2019 United Nations High Level Political Forum.

All countries that receive some form of official development co-operation (or sovereign development finance) are invited to participate in the monitoring round. A “live document” with the list of countries that have expressed their interest in participating in the monitoring exercise is available at www.effectivecooperation.org/2018monitoring.

All development partners have a role to play in the success of the monitoring round and we encourage you to participate, both at headquarters and country level. It is critical for credible, complete data reflecting the performance of your programmes. Development partners are invited to contact the OECD-UNDP Joint Support Team at monitoring@effectivecooperation.org.

This mini-guide and other relevant supporting documents for development partners for this round are available under the tab “Development Partners” at: www.effectivecooperation.org/2018monitoring.
GLOBAL PARTNERSHIP MONITORING IN A NUTSHELL

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2018 MONITORING GUIDE
WHO IS WHO IN GLOBAL PARTNERSHIP MONITORING

The Global Partnership monitoring exercise is characterised by the participation of various actors. In this Monitoring guide we use the following terminology, described below for clarity:

**PARTICIPATING GOVERNMENTS**

Also known in this Guide as partner countries. These are the countries and territories leading the monitoring exercise. Some participating countries are both providers and recipients of development co-operation.

**DEVELOPMENT PARTNERS**

These are the bilateral and multilateral agencies and funds that provide official development co-operation funding to participating governments -- whether concessional or not.

**DOMESTIC ACTORS**

These domestic stakeholders may include the private sector, civil society, foundations, trade unions, parliaments and subnational governments.

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**NATIONAL CO-ORDINATOR**

The national co-ordinator is the official sitting in a core ministry or agency from each participating government, who leads the monitoring exercise.

**FOCAL POINT(S)**

Focal points are appointed by the various stakeholders to facilitate exchanges and dialogue with national co-ordinators of participating governments.

**OECD-UNDP JOINT SUPPORT TEAM**

The Joint Support Team is a team of officials based in Paris and New York dedicated to support the participation of all actors in the monitoring exercise.
What is the Global Partnership?
The Global Partnership for Effective Development Co-operation was established by 163 countries in Busan (2011) as a multi-stakeholder platform that aims to advance the effectiveness of all development efforts and contribute to the achievement of the Sustainable Development Goals (SDGs). It fosters engagement and mutual learning on how to make development co-operation more aligned, effective, country-owned, results-oriented, inclusive, transparent and accountable.

What is the purpose of the Global Partnership Monitoring?
The monitoring exercise helps countries and their development partners assess progress, opportunities and obstacles in aligning their efforts and partnerships with the effectiveness principles. Improving the quality, impact and effectiveness of development co-operation is crucial to ensure that the SDGs are achieved.

What does the Global Partnership monitor?
Its monitoring framework is comprised of 10 indicators focusing on strengthening and using countries’ domestic institutions, increasing transparency and predictability of development co-operation, and supporting better engagement of foreign and domestic partners in development.

How does the monitoring exercise work?
The monitoring exercise is led by national governments from partner countries and brings together bilateral and multilateral organisations, the private sector, and civil society, among others, to make these partnerships more effective. Participating governments appoint a national co-ordinator, who collaborates with focal points from development partners and from other stakeholders to obtain the country results.

How will the data be used?
Country-specific results of the monitoring exercise, along with global aggregates, provide key evidence through which partners can identify strengths and opportunities, and guide dialogue to action to maximise the impact of their joint work. The monitoring exercise helps countries and their partners identify ways to enhance their collaboration in working towards the SDGs. It also provides official data for several SDG 17 and 5 targets. Implementing the commitments monitored through this exercise has a catalytic effect in achieving all other SDGs.

What is the timeline for the 2018 monitoring exercise?

What tools are available?
Multiple support tools complement this mini-guide for development partners: a permanent helpdesk (monitoring@effectivecooperation.org), short videos, user-friendly excel-based tools to gather data, and a regularly updated list of participating countries. All tools are made available at effectivecooperation.org/2018monitoring
PART 1
UNDERSTANDING
GLOBAL PARTNERSHIP
MONITORING
Through its monitoring exercise, the Global Partnership supports partner countries and development partners in tracking the implementation of effective development co-operation commitments, aimed at implementing four development effectiveness principles – country ownership, a focus on development results, inclusive partnerships, and enhancing transparency and mutual accountability.

The monitoring exercise contributes to the Sustainable Development Goals (SDG) follow-up and review process by generating data for SDG 17 and SDG 5, and by helping countries assess how effective all actors are in working together to support national development priorities and development results.

The Global Partnership monitoring exercise helps strengthening co-ordination between all partners, increasing the efficient delivery of development co-operation financing. Stakeholders can use monitoring data and reports to track progress in meeting effective co-operation commitments. This allows for evidence-based dialogue on successes, challenges and follow-up actions to improve partnerships and create behaviour change for new and better partnerships. There are specific benefits for various stakeholder groups:

As one of the key instruments to measure the means of implementation of the 2030 Agenda for Sustainable Development, the monitoring process generates data for countries to assess their progress towards achieving three SDG targets: 5.c, 17.15 and 17.16. More importantly, making progress in implementing effectiveness commitments, as monitored through the Global Partnership exercise, has a broader catalytic effect in achieving all other SDGs.
FOR PARTICIPATING GOVERNMENTS, PARTICIPATION IN THE MONITORING EXERCISE...

**PROVIDES EVIDENCE**

...provides data and evidence to empower decision-makers in managing development co-operation.

The results of the monitoring exercise provide a concrete foundation on which governments can hold their partners accountable to ensure effectiveness commitments are met with action. The results identify effectiveness successes and challenges, spurring national dialogue and driving behaviour change to ensure improved impact of development co-operation.

**BUILDS CAPACITY**

...builds capacity to monitor effectiveness in country.

Governments choosing to participate in the monitoring exercise are provided with a series of guidance and tools to facilitate the process, as well as virtual and in-person trainings. This experience can serve to build capacity in the areas of aid effectiveness, monitoring and evaluation, information management and partner coordination.

**MEASURES SDGS**

...supports SDG reporting.

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**ENTRY POINT FOR PARTNERSHIPS**

...serves as an entry point to mobilise and engage with a broad range of stakeholders.

Effective and inclusive partnerships are vital to achieve the SDGs and sustainable growth. The monitoring exercise is a concrete opportunity to start or to strengthen dialogue with the private sector and with civil society. In cases where engagement platforms do not already exist, governments can use the monitoring exercise to create mechanisms for dialogue with other development actors.

**SPOTLIGHT**

...showcases south-south and technical co-operation.

An increasing number of countries play a dual role as providers and beneficiaries of development co-operation. Through a tailored approach to the monitoring exercise, dual-role countries can highlight and evaluate the effectiveness of the co-operation they provide, ensuring it is used for maximum impact.

**LEADS TO ACTION**

...helps guiding the actions of development partners.

Development partners committed again in 2016 to “finish the unfinished business” of the aid effectiveness agenda, such as delivering support in line with the national policies and priorities of partner countries, and to do so while strengthening and relying upon those country institutions to deliver their support.

...provides data and evidence to empower decision-makers in managing development co-operation.

...builds capacity to monitor effectiveness in country.

...supports SDG reporting.

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FOR DEVELOPMENT PARTNERS, PARTICIPATION IN THE MONITORING EXERCISE...

DEVELOPMENT EFFECTIVENESS

... provides an opportunity to work with partner countries more effectively.

As noted above, results of the monitoring exercise provide data and evidence that can be used to make development co-operation more effective, thereby maximising development impact. The process itself also serves as a tool to strengthen and improve co-ordination and dialogue mechanisms at the country level, among partners and with other domestic actors.

JOINT SOLUTIONS

... helps participants seek joint solutions.

There are often cases in which specific challenges prevent partners from being able to fully implement effectiveness commitments in country. The monitoring exercise provides the space for partners to elaborate on why this is the case, facilitating frank discussions with government counterparts on actions required from both sides to enable more effective development co-operation.

FOR DOMESTIC ACTORS, PARTICIPATION IN THE MONITORING EXERCISE...

INCLUSIVE PROCESS

... provides a unique multi-stakeholder process to engage in dialogue and identify solutions.

It is encouraged that all domestic actors are engaged in the monitoring exercise. While not every stakeholder will be involved in providing data and evidence, all stakeholders can have a valuable role to play in reviewing country results and helping identify ways forward to boost countries’ sustainable development.
1.3 WHAT DOES THE EXERCISE MONITOR?

The Global Partnership’s monitoring framework tracks development stakeholders’ progress in aligning their policies and practices with four internationally agreed development effectiveness principles. Specifically:

**Indicator:** Countries strengthen their national results frameworks (1b)
**Indicator:** Development partners use country-led results frameworks (1a & SDG 17.15)

**Ownership of development priorities by developing countries**

**Indicator:** Development co-operation is predictable: annual predictability (5a)
**Indicator:** Development co-operation is predictable: medium-term predictability (5b)
**Indicator:** Quality of Countries’ Public Financial Management Systems (9a)
**Indicator:** Development partners use country systems (9b)
**Indicator:** Aid is untied (10)

**Inclusive development partnerships**

**Indicator:** Quality of Public-Private Dialogue (3)
**Indicator:** Civil society organisations operate within an environment that maximises their engagement in and contribution to development (2)

**Transparency and accountability to each other**

**Indicator:** Transparent information on development co-operation is publicly available (4)
**Indicator:** Mutual accountability among development actors is strengthened through inclusive reviews (7)
**Indicator:** Development co-operation is included in budgets subject to parliamentary oversight (6)
**Indicator:** Countries have systems to track and make public allocations for gender equality and women’s empowerment (8 and SDG 5c)
By participating in the 2018 monitoring round, countries providing and/or receiving development co-operation obtain official estimates for **SDG targets 17.16 and 17.15**, which are critical means of implementation (**SDG 17**) to achieve all the other Sustainable Development Goals. Moreover, countries leading the exercise also obtain official data for **SDG target 5.c**.

**1.4 WHAT SUSTAINABLE DEVELOPMENT GOALS ARE DIRECTLY MEASURED BY THIS MONITORING EXERCISE?**

- For countries that are **only providers of development co-operation**, the Global Partnership generates country scores for targets 17.15 and 17.16.
- If these countries also wish to generate country estimates for **SDG target 5c**, please contact the OECD-UNDP Joint Support Team at monitoring@effectivecooperation.org to obtain the relevant questionnaire and indicator-reporting instrument.
1.5 HOW DOES THE MONITORING ROUND WORK?

Four parameters guide Global Partnership monitoring exercises, which are...

...led by countries.
Partner countries appoint a national co-ordinator to lead the exercise and liaise with development partners and other stakeholders.

...multistakeholder.
The process is undertaken in collaboration with relevant domestic actors and external development partners.

...evidence-based and action-oriented.
The results will have the ownership of all participants, and will serve to guide actions to address bottlenecks.

...closely supported.
The OECD-UNDP Joint Support Team provides guidance and support throughout the exercise.

Table 1 shows a detailed sequence for both participating countries and development partners engaging in the 2018 monitoring exercise. A summary of steps for development partners is as follows:

1. Bilateral and multilateral development partners appoint a focal point at headquarter (HQ) level to facilitate participation in the 2018 monitoring round. (phase 1).
2. Appointed focal points and their teams are supported by the OECD-UNDP Joint Support Team in preparing for the monitoring exercise, with tailored guidance, helpdesk and ongoing assistance. (phase 2).
3. The OECD-UNDP Joint Support Team makes available a list of the countries participating in the 2018 monitoring round to facilitate engagement and collaboration. (phase 3).
4. Development partners with country offices or embassies in the participating countries designate focal points at country level. These focal points participate in kick-off meetings/workshops convened at the country level. (phase 4).
5. As the data collection process takes place in the country until 31 October 2018, focal points (at HQ or country level) serve as contact persons for country data requests from participating governments for a selection of indicators (Table 2).
6. Once the data collection is completed, results are shared and validated with the different partners, so that complete country data can be submitted to the OECD-UNDP Joint Support Team. During the final validation and review phase, development partners with an appointed focal point at headquarters level will have a chance to review and ensure that data reported on their development co-operation programme are accurate and complete. They can share any additional inputs or suggestions directly with national co-ordinators from participating partner countries, who have until 31 December 2018 to send the final country dataset (phase 5).
7. The OECD-UNDP Joint Support Team, in consultation with participating partner countries, prepares country-specific reports. It also aggregates global results per partner (phase 6).
8. Countries and partners use the monitoring results as entry points to discuss and agree on strategies that could help unlock bottlenecks, improve their joint partnerships, and make development co-operation more aligned and results-oriented, country-owned, catalytic and transparent. Equally important, the results also help countries and bilateral development partners prepare their Voluntary National Reviews to the United Nations, inform global reports on the Sustainable Development Goals and on Financing for Development, and enable all participants with evidence to influence global dialogue and decision-making in 2019 – including in the context of the 2019 UN High-Level Political Forum on Sustainable Development (phase 6).
**Table 1. Indicative 2018 Monitoring Timeline: Step by Step**

<table>
<thead>
<tr>
<th>Starting</th>
<th>Phase 1. Launch of the monitoring round</th>
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| June-July 2018 | - The OECD-UNDP Joint Support Team sends an official invitation to participate in the monitoring exercise from the Global Partnership ministerial Co-Chairs to relevant authorities in partner countries and in development organisations.  
- Partner country governments confirm their interest in participating in the monitoring round and appoint a national co-ordinator to manage the exercise at country level.  
- **Development partners designate a focal point in headquarters to facilitate their participation in the monitoring exercise. Contact details of the designated focal point are sent to monitoring@effectivecooperation.org**  |

<table>
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<tr>
<th>July – August 2018</th>
<th>Phase 2. Country-level sensitisation and preparation</th>
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|                   | - The Joint Support Team provides reporting tools and guidance, and organises a series of virtual trainings for national co-ordinators and development partners.  
- National co-ordinators organise the launch of the monitoring process at the country level – often through a kick-off meeting or workshop that involves the full variety of development partners at country level.  
- **Development partners designate focal points at country level and support and/or participate in kick-off meetings convened at the country level.**  |

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<tr>
<th>August – October 2018</th>
<th>Phase 3. Data collection and validation at country level</th>
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|                       | - National co-ordinators coordinate data collection. Where possible, the national co-ordinator is encouraged to use existing in-country platforms and tools to inform data collection and related dialogue.  
- **Development partners & other development stakeholders participate in data collection, providing information as requested by national co-ordinators and participating in consultations where necessary.**  
- The Joint Support Team provides ongoing support to national co-ordinators during the data collection process.  
- National co-ordinators liaise with development partners and other domestic stakeholders to validate all data before submitting it to the Joint Support Team by 31 October 2018.  |

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<th>November – December 2018</th>
<th>Phase 4. Final validation and review</th>
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|                         | - The Joint Support Team reviews the submitted information, in consultation with national co-ordinators, to ensure data comprehensiveness and accuracy.  
- **Development partners at headquarters level support data review efforts, providing additional suggested inputs to national coordinators to ensure complete and accurate data sets.**  
- National co-ordinators consolidate feedback from the OECD-UNDP Joint Support Team and development partners and submit the final dataset.  |
Table 1. Indicative 2018 Monitoring Timeline: Step by Step

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<tr>
<th>January - June 2019</th>
<th>Phase 5. Analysis and outputs</th>
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<tr>
<td></td>
<td>The Joint Support Team aggregates and analyses data, and prepares country profiles and global reports. Data and evidence is submitted to relevant agencies to inform the global follow-up and review of the SDGs and Financing for Development commitments.</td>
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<th>Throughout 2019</th>
<th>Phase 6. Dissemination, dialogue and action on the results</th>
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<td></td>
<td>Partner country governments, development partners and other stakeholders participate in follow-up and review of monitoring findings at country, regional and global levels. Results can be used to introduce policy changes and strengthen co-ordination arrangements, both in countries and within development organisations. Data from the monitoring round can also be used to report on progress in SDG 17 and SDG 5. Toolkits and guidance on how to move from results to action will be made available together with the country reports.</td>
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The results of the 2016 round have led to concrete actions from development agencies to improve their partnerships and strategies. Some examples are detailed below:

**HOW HAVE PAST MONITORING RESULTS BEEN USED?**

- **The 2016 monitoring round helped reveal sharp improvements in medium-term predictability and use of partner country systems amongst Southern providers, such as China, Kuwait, the Arab Fund and the OPEC Fund. Regional Development Banks in Latin America (IDB, CAF) and Africa (AFDB, BOAD) also showed large improvements.**

- **The European Union and its members states guided the new European Consensus for Development to align programming with the four effectiveness principles. New strategies and Instruments are being designed in line with these principles.**

- **At present, most development partners are supporting partner countries in their efforts to align to the Sustainable Development Goals. Many are also adapting their results frameworks and systems to match the ambitions of the 2030 Agenda.**

- **Building on 2016 monitoring results, UNDP is supporting Costa Rica and Honduras strengthen their national development co-operation policies and multi-stakeholder accountability arrangements. It is also supporting countries like Malawi and Uganda map and manage the increasingly broader development finance landscape more effectively.**

- **The surge in the number of development partners publishing to IATI, OCED DAC, as well as to SEGIB (on South-South Co-operation) reveals widespread efforts to improve transparency of development co-operation across the board.**

- **Support to strengthen collaboration of partner governments with private sector and civil society actors is critical for inclusive development. Canada, the EU, Germany, the UN, the United States, Sweden and the World Bank are active actors in this field.**
PART 2
CO-OPERATING WITH PARTNER COUNTRIES LEADING THE MONITORING PROCESS
CO-OPERATING WITH PARTNER COUNTRIES
LEADING THE MONITORING PROCESS

The monitoring process is a voluntary exercise led by participating partner countries. Participating governments take the lead in managing the process, in gathering inputs and data from a variety of partners and domestic stakeholders (including from other parts of the public sector, bilateral and multilateral development partners and funds, private sector representatives, civil society organisations and trade unions), and in facilitating a broad validation and discussion of the results (including with the concurrence of parliaments, subnational governments, foundations and others, as needed).

Phase 1. Launch of the monitoring round: June – July 2018

The OECD-UNDP Joint Support Team sends an official invitation to participate in the monitoring exercise from the Global Partnership ministerial Co-Chairs to relevant ministers in partner countries and to heads of organisations, and invites development partners to renew their support for their partner countries during the monitoring exercise.

Partner country governments confirm their interest in participating in the monitoring round and appoint a national co-ordinator to manage the exercise at country level. The national co-ordinator is usually an official with responsibility for overseeing the management of development co-operation.

Development partners appoint a headquarter (HQ) focal point, to guide their overall engagement in the 2018 monitoring round.
The national co-ordinator starts liaising with counterparts from other ministries, development partner organisations and other stakeholders. Specific responsibilities include:

- Outreach to other relevant stakeholders in country (bilateral and multilateral development partners and funds, and representatives or focal points from domestic actors, such as the private sector, civil society organisations, trade unions, foundations, subnational governments and parliaments) to raise awareness and gather participation.

**Good practice:** Organising a kick-off meeting or workshop involving the full variety of actors in the country.

As soon as partner countries confirm participation in the round, the development partners’ focal point in headquarters can either:

- Identify a contact person in the relevant country office or embassy and share contact details with the national co-ordinator and OECD-UNDP Joint Support Team (at monitoring@effectivecooperation.org). Country level focal points can support and/or participate in kick-off meetings convened at the country level.

- Serve as contact person for country data requests, if needed (e.g. due to lack of country-level presence).

A list of countries participating in the monitoring round is made available at [www.effectivecooperation.org/2018monitoring](http://www.effectivecooperation.org/2018monitoring). This list will be regularly updated to include the new participants. This allows development partners to identify countries where they need to identify local contacts, and to prepare for the following phases.
**Phase 3. Data collection and validation at country level: August-October 2018**

*National co-ordinators* liaise with relevant national stakeholders to collect data for selected indicators, as well as consolidating and reporting data in the Global Partnership monitoring data reporting tool called *Country Excel* (see Table 2). Dialogue and consultation with these stakeholders – before, during and after the data collection process – is encouraged to ensure an easy and credible process.

*Development partners and other development stakeholders* participate in data collection, providing information as requested by national co-ordinators and participating in consultations where necessary. National co-ordinators will share another excel tool prepared by the Joint Support Team for development partners, called *DP Excel*, to easily collect inputs from them. This tool, as well as the tool for partner countries (Country Excel) are made available from the Joint Support Team and can be downloaded from [www.effectivecooperation.org/2018monitoring](http://www.effectivecooperation.org/2018monitoring).

*Focal points and their teams* can find detailed guidance on how to report on relevant Global Partnership indicator in Part 3 of this document. The Joint Support Team is available to provide ongoing support to focal points during the data collection process.

*National co-ordinators* validate country-generated data through multi-stakeholder dialogue to ensure high-quality reporting, as well as to strengthen mutual understanding of progress and challenges in meeting effectiveness commitments.

*National co-ordinators* validate country-generated data through multi-stakeholder dialogue to ensure high-quality reporting, as well as to strengthen mutual understanding of progress and challenges in meeting effectiveness commitments. **As much as possible, to ensure broad country-level awareness and ownership of the results, it is encouraged that representatives from across stakeholder groups, including various government ministries, development partners, civil society, the private sector, trade unions, local governments and parliamentarians, meet to discuss and validate the data at country-level.** This is an important step to build trust among partners and ensure that the monitoring results are well received in later phases of the exercise. This dialogue is also helpful in identifying data gaps and challenges for future analysis. This can allow for improvements to be identified and implemented, and in time, to help improve the availability and capacity to manage and use data at country level.

After validation of the data collected at country level, the national co-ordinator will share the country data with the OECD-UNDP Joint Support Team, submitting the *Country Excel* file to monitoring@effectivecooperation.org. National co-ordinators are requested to submit the data no later than 31 October 2018.
Table 2. Overview of reporting roles per indicator

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<thead>
<tr>
<th>GLOBAL PARTNERSHIP INDICATORS</th>
<th>Governments</th>
<th>Dev. Partners</th>
<th>Private Sector</th>
<th>CSOs</th>
<th>Global sources</th>
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<tr>
<td>1a: Development partners use country-led results frameworks</td>
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<td>1b: Countries strengthen their national results frameworks</td>
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<td>2: Civil society operates within an environment that maximises its engagement in and contribution to development</td>
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<td>3: Public-private dialogue promotes private sector engagement and its contribution to development</td>
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<td>4: Transparent information on development co-operation is publicly available</td>
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<td>5a: Annual predictability of development co-operation</td>
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<td>5b: Medium-term predictability of development co-operation</td>
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<td>6: Development co-operation is on budget and subjected to parliamentary scrutiny</td>
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<td>7: Mutual accountability is strengthened through inclusive reviews</td>
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<td>●</td>
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<td>8: Countries have systems to track and make public allocations for gender equality and women’s empowerment</td>
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<td>9a: Quality of Country Systems</td>
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<td>9b: Development partners use countries’ own systems</td>
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<tr>
<td>10: Aid is untied</td>
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<td>●</td>
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</table>

This stakeholder responds to the indicator: ●
This stakeholder complements with additional inputs: ←
This stakeholder validates inputs from other stakeholder: ✔
This stakeholder can complement with inputs, as needed: ○

Phase 4. Final validation and review: November – December 2018

The OECD-UNDP Joint Support Team reviews the submitted information in consultation with national co-ordinators to ensure comprehensiveness and accuracy of data.

Headquarters’ offices of development partners support data review efforts by suggesting inputs to national co-ordinators that could ensure completeness of country-level data. This step is critical to ensure that data submitted is complete and accurate, and reflects the reality of development partners.

National co-ordinators consolidate feedback from the Joint Support Team and development partners and submit a final version to monitoring@effectivecooperation.org.
Following the receipt of a final data set from National co-ordinators, the OECD-UNDP Joint Support Team will collate and close the data set to allow for aggregation and analysis. Products featuring the findings will become available to countries throughout the first half 2019 in various formats, including:

**Country and territory profiles**

Individual monitoring profiles will help participating governments summarise country-level progress, contextualise the findings, and identify opportunities and challenges in working together more effectively. This country-specific analysis will provide actionable evidence to guide governments and their partners in taking forward monitoring results. The profiles will be developed on a rolling basis, after countries complete the data collection and validation phases, and in consultation with them.

**Global reporting**

Global reporting and analysis on the monitoring results will be published to inform the upcoming 2019 High-Level Forum on Sustainable Development, to guide collective action towards more effective development co-operation.

**Online dashboard reporting, visualising and comparing all monitoring data.**

Data and evidence generated through the country-led monitoring process will also be disseminated through the online Global Partnership Monitoring Dashboard. The Dashboard allows development stakeholders to view, explore and compare results and progress for all participating countries, territories, and organisations across regions and contexts.
Phase 6. Dissemination, dialogue and action on the results

The 2018 monitoring results provide numerous benefits to national governments, development partners and all development actors and stakeholders that will support transformative change:

*At country level*

For participating countries, country-specific monitoring results, along with global aggregates, provide concrete evidence through which partners can hold each other accountable to ensure commitments are met with action, identify challenges and jumpstart dialogue to maximise the impact of their joint work. Past participation in the monitoring process has resulted in the establishment and strengthening of national development co-operation policies and coordination mechanisms, as well as overall increased efficiency among national development stakeholders to accelerate the achievement of government development priorities.

*Figure 1. Using the monitoring results*

As one of the key instruments to measure the means of implementation of the 2030 Agenda for Sustainable Development, the Global Partnership monitoring process generates data for countries to assess progress towards achieving global SDG targets on respecting countries’ policy space and leadership in setting their development path (SDG 17.15); strengthening multi-stakeholder partnerships for development (SDG 17.16); and adopting sound policies for the promotion of gender equality and women’s empowerment (SDG 5c). More importantly, making progress in implementing effectiveness commitments, as monitored through the Global Partnership exercise, has a broader catalytic effect in achieving all other SDGs.
For development partners, the data collected and the results of the monitoring round can help identifying opportunities for improving their development strategies in order to align themselves with the principles of effectiveness. Potential improvement tracks include using country systems for development financing, engaging with various in-country stakeholders such as CSOs, the private sector, trade unions and parliamentarians, strengthening cooperation to design, implement and evaluate programs and policies.

**At global level**

Findings from the monitoring exercise are used to stimulate and inform international policy dialogue. The 2018 monitoring results will generate robust, comparable and timely evidence to inform international dialogue and spur continued collective action for strengthened effective development co-operation, which is a key driver of success to implementing the 2030 Agenda.

Monitoring data will inform the 2019 SDG and Financing for Development follow-up and review processes (Figure 2). The results will also inform international policy dialogue during the 2019 High-Level Political Forum on Sustainable Development, scheduled by the United Nations to be held in New York, July 2019.

**Figure 2. How does country-led monitoring inform SDGs follow-up and the international dialogue on development co-operation effectiveness?**
The OECD-UNDP Joint Support Team actively supports governments in leading the monitoring exercise and the participation of other stakeholders, by providing guidance, training and support throughout the monitoring process.

All the tools, instruments and services will be made available progressively on the dedicated website [www.effectivecooperation.org/2018monitoring](http://www.effectivecooperation.org/2018monitoring), to help the different participants throughout the exercise. **Development partner tools and guidance are marked in yellow:**

### 1. Sensitisation and awareness raising

<table>
<thead>
<tr>
<th><strong>2018 Monitoring: Country Brochure</strong></th>
<th><strong>Development Partner Brochure</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>A four-page leaflet containing strategic information on the benefits, usefulness, timeline and steps to participate in the monitoring round.</td>
<td>A similar four-page leaflet to help national co-ordinators raise awareness amongst development partners on the benefits of their active engagement in the 2018 exercise.</td>
</tr>
</tbody>
</table>

### 2. Guidance and checklists

<table>
<thead>
<tr>
<th><strong>Strategic Booklet for national co-ordinators</strong></th>
<th><strong>2018 Monitoring Guide</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>A short booklet that contains key information for national co-ordinators on how to run the monitoring process in their country for strategic management of the process. <strong>A shorter version of the guide. It is recommended for partner countries’ senior level officials.</strong></td>
<td>A detailed technical guide, available in English, French and Spanish, that contains step-by-step instructions on how to run the monitoring exercise and how to report on the indicators. The document is recommended for technical staff from partner countries.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>2018 monitoring process checklist</strong></th>
<th><strong>Development Partners Mini Guide</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>An indicative list of steps to guide national co-ordinators to implement the monitoring exercise easily. <strong>This document is recommended for partner countries’ national co-ordinators</strong></td>
<td>This mini guide will help you understand your role as development partner, the benefits of participating in the monitoring round, and how to collaborate and share data with partner countries leading the exercise. <strong>This document, highly recommended for development partners.</strong></td>
</tr>
</tbody>
</table>

**Technical Companion document** (Only for reference)

*The data-reporting tool (Country Excel) automatically calculates all the indicators for participating countries. Nonetheless, curious participants can learn about the methodologies to calculate the different indicators, which are detailed in this technical document.*

### 3. Data reporting tools

<table>
<thead>
<tr>
<th><strong>For partner countries</strong></th>
<th><strong>For Development Partners</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>A user-friendly excel-based reporting tool (<strong>Country Excel</strong>) will be available in English, French and Spanish starting in August to support national co-ordinators during the data collection process.</td>
<td>Partner countries will share an excel tool (<strong>DP Excel</strong>) with your country office/embassy colleagues. The tool will be available on 6th August. The DP Excel helps partner countries gathering inputs from development partners.</td>
</tr>
</tbody>
</table>

*To minimise transaction costs and explanations, both excel files contain self-guided instructions, automatic checks and built-in formulas for programmed calculations*
### 4. Training and capacity building

<table>
<thead>
<tr>
<th><strong>Online Course on Development Effectiveness Monitoring</strong></th>
<th><strong>Virtual trainings</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>A self-paced, online training course to manage the monitoring process and report on the indicators effectively. Participants who complete the course successfully will earn a certification on development co-operation effectiveness monitoring.</td>
<td>A series of virtual trainings and webinars on the process and the indicator methodologies will be available to support participants.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Short explanatory videos</strong></th>
<th><strong>International workshop</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Short YouTube videos will be available for on-the-spot consultation on how to report for each indicator, with step-by-step guidance.</td>
<td>To maximize the benefits of this exercise, countries participating in the 2018 monitoring round are welcome to join a dedicated Global Partnership technical meeting in Paris on 11-12 September 2018.</td>
</tr>
</tbody>
</table>

### 5. Ongoing support throughout the monitoring exercise

<table>
<thead>
<tr>
<th><strong>Helpdesk</strong></th>
<th><strong>Live regular sessions</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Participants can contact the OECD-UNDP Joint Support Team with questions or requests at any time by writing to the permanent Helpdesk: <a href="mailto:monitoring@effectivecooperation.org">monitoring@effectivecooperation.org</a>. Specialists from OECD and UNDP will answer your message as quickly as possible.</td>
<td>Regular Q&amp;A sessions will be available on an on-going basis where participants can ask questions to the OECD-UNDP Joint Support Team for immediate answer or clarification.</td>
</tr>
</tbody>
</table>

Experience from past monitoring rounds shows that -more often than not- **there are development partners with country presence that are able and interested in providing active support to national co-ordinators**. This is a good practice that should be encouraged.

When development partners have provided support to national co-ordinators, this has included some of the following modalities:

1. Helping co-ordinate the rest of development partners to be informed and actively engage in the exercise and in providing timely and accurate data to the national co-ordinator.
2. Providing in-kind technical support (or funding consultant support) to help national co-ordinators in completing the technical data collection.
3. Providing (or funding) the logistics and facilitation of kick-off workshops and/or multi-stakeholder dialogues needed to report on some indicators.
4. Helping co-ordinate or facilitate the final validation phase of the monitoring results, as well as follow-up on actions to improve the results.
PART 3

REPORTING ON THE GLOBAL PARTNERSHIP INDICATORS
REPORTING ON THE GLOBAL PARTNERSHIP INDICATORS: STEP-BY-STEP GUIDANCE

This section explains how to report on the Global Partnership indicators, step by step. It also proposes an efficient sequence to report on the indicators (see section 3.1).

You can review the full list of Global Partnership indicators in Table 2 (see page 18 of this mini guide). There, you noticed that:

1. **Some indicators only require partner country data**, as they reflect partner governments’ commitments to establish national results frameworks, operate in inclusive ways with civil society and the private sector, strengthen domestic institutions and establish transparent and accountable practices. Development partners should not worry about reporting on these indicators, but they are encouraged to participate and discuss the country results during the final validation and review process (end of phase 3), as to ensure country data is as comprehensive and accurate as possible.

2. **Other indicators require inputs from development partners (1a, 5a, 6, 9b and 7)**. These indicators focus on commitments to align development co-operation to countries’ priorities, increase predictability, use of country systems, and help build more inclusive co-ordination and accountability arrangements in the country.

The following section focuses on indicators reported by development partners. These require inputs from development partner, to be shared with partner countries' national co-ordinators using a “DP Excel” (see Tools in page 22 and in Section 3.2). This section provides step-by-step guidance and related questionnaires, explanations and definitions:

<table>
<thead>
<tr>
<th>Indicators that national co-ordinators report with inputs from development partners:</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicator 1a: Development partners use country-led results frameworks</td>
<td>30</td>
</tr>
<tr>
<td>Indicator 5a: Development co-operation is predictable: annual predictability</td>
<td>37</td>
</tr>
<tr>
<td>Indicator 6: Development co-operation is included in budgets subject to parliamentary oversight*</td>
<td>37</td>
</tr>
<tr>
<td>Indicator 9b: Development partners use country systems</td>
<td>40</td>
</tr>
<tr>
<td>Indicator 7: Mutual accountability among development actors is strengthened through inclusive reviews**</td>
<td>47</td>
</tr>
</tbody>
</table>

* Development partners do not need to provide additional data specifically for indicator 6, as the data used is derived from question 5a.

** Development partners are asked to provide complementary data to the national co-ordinator for this indicator.

3.1 How development partners input evidence and data into the monitoring process

1. National co-ordinators send the DP Excel to their development partners

2. Country level contacts or HQ focal points input the data in DP Excel

3. Country level validation of all Global Partnership indicators

4. Partner countries review the data, validate and integrate inputs into the Country Excel

5. Final triangulation with development partners’ headquarters for comprehensiveness and accuracy

* Indicator 6 is estimated by combining some development partners’ inputs for indicator 5a, and partner countries’ budget records for the reference fiscal year. No additional data is needed from development partners.
After participating partner countries have identified their respective development partners, they will send the DP Excel to each of their counterparts at country level (or, in absence, to the headquarters focal point). You can familiarise yourself with the DP Excel, as it will be available at the 2018 monitoring website (effectivecooperation.org/2018monitoring) starting 6th August 2018.

**Development Partner (DP) Excel**

- The DP Excel is a self-explanatory excel file that will help national co-ordinators from partner countries collect inputs and data from their development partners on 4 specific indicators on alignment, predictability, joint reviews and use of country systems.
- First, national co-ordinators share the DP Excel with all the bilateral and multilateral development partners and funds working in the country.
- If you are not reached out by your partner country within a reasonable period of time (e.g. by 1st October 2018), please contact them or our Helpdesk to ensure that your programme is showcased as well and avoid future iterations.
- The DP Excel is self-explanatory, containing instructions and explanations. It also contain links to the 2018 Development Partner Mini Guide (this document) and the Development Partner Brochure where you can learn about the benefits of participating in the 2018 monitoring round and on how to report on these indicators.
- The DP Excel contains space for you to identify yourself as a partner and provide your inputs on relevant indicators, in tabs “1A-M1”, “1A-M2”, “5a & 9b” and “7”, as well as any additional comment you may have.
- Note: Partner countries use a separate tool (Country Excel) to consolidate data for all the Global Partnership indicators, including the ones generated with development partner data and collected through the DP Excel.

- **Important note:** it is advisable that entities part of a bilateral development co-operation system consolidate their inputs and report as one development partner. E.g. Country X provides development co-operation through its ministry of foreign affairs, its development agency, its development bank, and other line ministries. Consolidated input for Country X is provided to participating partner countries.

- **Currency:** All figures relating to amounts have to be reported in US dollars (USD) - please refer to the exchange rate table provided on the monitoring website. Please only enter numbers (no spaces, no commas).

- **Year of reference:** For all indicators unless otherwise specified, the reporting year of reference is the latest government fiscal year for which there is information available. For indicator 1a, development partners will report on their six largest interventions from all the new interventions equal or above USD 100,000 approved by the development partner in 2017 (independently from the fiscal year used to report on the other indicators).
How the Development Partner (DP) Excel looks like

### INDICATORS 5e & 9b

<table>
<thead>
<tr>
<th>Reporting Year:</th>
<th>Select Start Month/Year:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select End Month/Year:</td>
</tr>
</tbody>
</table>

Please answer the following questions regarding development co-operation in the country that you are reporting for:

- The information for Indicators 5e & 9b is collected at the provider level (i.e. aggregated numbers), and is separated according to concessional and non-concessional funding.
- Concessional vs Non-Concessional flows should be reported separately in the two columns provided. Please see the "Provider Instructions & Questions" worksheet for an explanation of the distinction between concessional vs. non-concessional funding.

### INDICATOR 1

Indicator 1: Development Co-operation is focused on results that meet development outcomes

<table>
<thead>
<tr>
<th>Project 1</th>
<th>Project 2</th>
<th>Project 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Executive summary of the project (max. 350 words approved in 2015)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. List of objectives and expected outputs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Impact of the intervention (max. 350 words approved in 2015)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### INDICATOR 7

Development partners participating in the country level monitoring round will have an opportunity to provide the following feedback:

**DEVELOPMENT PARTNER**

In the past 2 years, has your organisation joined mutual assessments of progress with the government and/or other development partners in the country? 

...And how effective were these reviews in informing the ways of working in the country to improve ownership, inclusiveness, focus on results, and increase transparency and accountability?

Please provide any observation if needed.
IMPORTANT NOTES
PLEASE READ BEFORE CONTINUING

Indicator 1a measures whether development partners plan their strategies and programmes with partner countries in alignment with their priorities and results; and whether monitoring and evaluation systems to assess the results of your country programme are well embedded with partner country’s own systems and results data. For this indicator, when prompted for the approved amount of each approved project in 2017 (module 2), you should indicate the total committed amount.

The indicators on annual predictability (5a), recorded on the budget of partner country (6) and the relative use of countries’ public financial management systems (9a) refer to how development co-operation financing was disbursed to the partner country. You will be asked to distinguish between funds disbursed directly to the partner country’s public sector from funds that were directly implemented, channeled through other bi- or multilateral partners, or through the private sector or civil society organisations.

Note that the indicators are attempting to assess the behavior, policies and practices chosen by the last official development organisation delivering the funds. For example, for some of these indicators (e.g. use of country systems) you will be recording your funds directly provided to your partner government, but not funds that you delegated or implemented throughout other agencies, as they would be the ones making the decision to use or not country systems to deliver.

All these considerations are fully described in the following pages. This note serves for caution, as these are common mistakes in reporting to indicators contained in the Global Partnership monitoring framework.
INDICATORS THAT NATIONAL CO-ORDINATORS REPORT WITH INPUTS FROM DEVELOPMENT PARTNERS:

Indicator 1a
Development partners use country-led results frameworks (SDG 17.15.1)

Indicator 5a
Development co-operation is predictable: annual predictability

Indicator 9b
Development partners use country systems

Indicator 7
Mutual accountability is strengthened through inclusive reviews

INDICATOR 1A: DEVELOPMENT PARTNERS USE COUNTRY-LED RESULTS FRAMEWORKS (SDG 17.15.1)

WHAT THIS INDICATOR MEASURES

The indicator measures the alignment of development partners with country-defined development objectives and results; as well as their progressive reliance on countries’ own statistics and monitoring and evaluation systems to track progress in achieving the intended results. The indicator offers estimates at strategic and at programming level, and complements indicator 1b on the quality of national results frameworks (a partner country responsibility).

The indicator provides the data for SDG target 17.15, measuring the degree of policy space and leadership accorded to a country in establishing its own path towards poverty eradication and sustainable development.

WHY THIS IS IMPORTANT

The extent to which development partners guide their development efforts in line with country-defined priorities and development results is a critical aspect of country ownership and results focus.
The extent to which country-led results frameworks are used by development partners is assessed as a two-layered process:

- **At strategic level (Module 1):** Development partners report on the characteristics of their current country strategy, partnership framework document or similar strategic document defining their partnership and strategic approach in the partner country.

- **At programming level (Module 2):** Development partners report on their six (6) largest programmes or projects in the partner country, from all the new interventions equal or above USD 100,000 that were approved by the development partner in 2017.

The strategic level assessment provides contextual information to interpret the results of the project level assessment.

Reporting at programming level consists of four (4) sub-indicators:

- **Indicator 1a.1** Alignment at objectives level: percentage of development interventions whose objectives are drawn from country-led result frameworks;
- **Indicator 1a.2.** Alignment at results level: percentage of results indicators contained in development interventions which are drawn from country-led results frameworks;
- **Indicator 1a.3.** Alignment at monitoring and statistics level: percentage of results indicators which will be monitored using government sources and monitoring systems;
- **Indicator 1a.4.** Partner government involvement in final evaluations: percentage of new interventions that plan a final evaluation with government involvement.

Elements of the programming level assessment provide the official data to report on SDG target 17.15 Respect each country’s policy space and leadership to establish and implement policies for poverty eradication and sustainable development. The SDG indicator 17.15.1 “Extent of use of country-owned results frameworks and planning tools by providers of development cooperation” is calculated by averaging the three sub-indicators 1a.1, 1a.2, and 1a.3.

---

1 The rational for focusing on the six largest programmes/projects equal to or above USD 100,000 is to capture a representative sample of development partners’ current practices (i.e. the largest portion of development co-operation financing flows) while avoiding overburdening development partners country offices and headquarters, and government national co-ordinators in the data collection and validation. The analysis of the 2016 monitoring results showed no significant bias in the results that could be attributed to the size of the interventions. In addition, the minimum amount of USD 100,000 ensures that technical co-operation support is also reported.

2 If the development partner has less than six qualifying interventions approved in the country during the reference year, it will report only on those approved interventions above USD 100,000 in value. If the development partner does not have any new intervention above USD 100,000 in the country, it will report at least on one -the largest- project approved in the country during the reference year, even if below the stated value threshold.

3 This amount is the total budget for the intervention as approved during 2017 (i.e. commitment), even if disbursements will be phased during subsequent years. By focusing only on interventions that have been recently approved in the year of reference, the indicator aims at reporting on the most recent behaviour of development partners (avoiding reporting on projects that were designed in previous years).

4 SDG indicator 17.15.1 metadata is available at: https://unstats.un.org/sdgs/metadata/files/Metadata-17-15-01.pdf
STEP BY STEP GUIDANCE

1. National co-ordinators in each partner country participating in the monitoring round will share the DP Excel with your contact point at country level, or with your headquarters focal point if you do not have country level focal point or presence.

2. The focal point at country level (or the headquarters focal point) will gather the necessary data to fill the requested entries, guided by the questionnaire below and the instructions contained in the DP Excel.

3. National co-ordinators import the information received from each of its development partners into the Country Excel, and verify the accuracy and completeness of the information. The indicator will automatically be estimated in the Country Excel when the information for all development partners has been included.

4. Once the country-level data gathering process is completed, partner countries submit the aggregated data to the OECD-UNDP Joint Support Team.

5. These country-generated data in the package is then shared with development partners' focal points at headquarters level during November-December, to give an opportunity for comprehensiveness and accuracy on the partner's programme. Suggestions and additional inputs derived from that review are sent directly to national co-ordinators, for consideration for the final country dataset.

QUESTIONNAIRE

• TO BE ANSWERED BY DEVELOPMENT PARTNERS AND VALIDATED BY NATIONAL CO-ORDINATOR

Module 1. Strategic level: Development partners use country-led results frameworks in defining their country strategies

Qp1. At this moment, is there a country strategy or a partnership framework that guides your development interventions in the country? [Yes/No]

If yes, please indicate the period it covers and provide the link to the document or include an electronic copy of it when you submit your answers to the questionnaire.

a. If yes, Have any of the following country-level stakeholders been engaged in the preparation?
   [ ] Government [ ] Civil society organisations [ ] Private sector [ ] Other stakeholders: ………….

Has the national government signed off to the final document? [Yes/No]

Development partners that answered yes to Q1 continue the survey

Qp2. How many priority areas for interventions are identified in your country strategy or partnership framework? [Number]

a. And among these priority areas, how many have been jointly identified with the government? [Number]

Qp3. Does your country strategy include a results framework with strategic objectives, results indicators and targets to measure progress in achieving the objectives? [Yes/No]

a. If yes, how many results indicators are included? [Number]

b. If yes, how many of these results indicators are drawn1 from the partner government's results frameworks, plans and strategies? [Number]

c. If yes, how many results indicators will be monitored using partner government official data and statistics? [Number]

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1 In this context, “drawn from partner government’s results framework” means that the results indicator matches an indicator included in the partner government’s national results framework(s), plans and strategies. Indicator wording should be close enough. Targets may vary, as development partners’ contribution is just a part of the country’s overall efforts.
Qp4. Does your country strategy/partnership framework include monitoring and evaluation arrangements? [Multiple answer possible]

- Monitoring
- Evaluation

a. If there are, how is the partner government involved? [Single answer among the following options]
   - No government involvement
   - The government is periodically informed on progress
   - The government is involved in the monitoring and/or evaluation process
   - The government is involved in the monitoring and/or evaluation process and in a discussion around the results

Qp5. How are the 2030 Agenda and SDGs incorporated or referenced in your country strategy or partnership framework? [Multiple answer among the following options]

- The 2030 Agenda/SDGs are referenced at strategic level [in the narrative]
- SDGs are referenced at goal level [in the narrative or results framework]
- SDGs are referenced at target level [in the results framework]
- SDGs are referenced at indicator level [in the results framework]
- There is no reference to the Agenda 2030 and the SDGs in the current country strategy or partnership framework
- There is no reference to the SDGs as the strategy was approved before September 2015.

(Optional). Please indicate the main constraints your agency faces, if any, in the use of country-led results frameworks for defining your country strategy or partnership framework.

Module 2. Programming level: Development partners use country-led results framework in defining their development interventions.

Development partners report on their six (6) largest programmes or projects, from all the new interventions above USD 100,000 approved in the country during 2017.

BASIC DESCRIPTORS

Qp1. Name of the intervention: [Name of the programme/project]
Qp2. Approved amount for the intervention: USD ___
Qp3. Approval date: [Month / Year]
Qp4. Type of intervention: ___ [Note: options offered in the data submission tool]
Qp5. Implementing institution: ___. If multi-sectoral, mark up to three options. [Note: options offered in the data submission tool]
Qp6. Sector that the intervention targets: ___ [Note: options offered in the data submission tool]

---

2 If the development partner has less than six qualifying interventions approved in the country during the reference year, it will report only on those approved interventions above USD 100,000 in value. If the development partner does not have any new intervention above USD 100,000 in the country, it will report at least on one -the largest- project approved in the country during the reference year, even if below the stated value threshold.
**ASSESSMENT FIELDS**

Qp7. Where are the objective/s of the intervention drawn from? ___ [Note: options offered in the data submission tool]

Qp8. Does the intervention have a results framework or logical framework? [Yes/No]

Qp9. How many results indicators are included in the results framework or logical framework of this intervention? [Number]
   a. Among the indicators included in the results framework of this intervention, how many are drawn from existing government results frameworks, plans and strategies? [Number]
   b. How many results indicators will be reported using sources of information directly provided by existing government monitoring systems or national statistical services? [Number]

Qp10. Is there a final evaluation planned for the intervention? [Yes/No]
   a. If yes, to what extent is the government involved in the evaluation? [Note: options offered in the data collection tool]

   [Optional]. What are the main constraints your agency faces, if any, in using the country’s results framework(s) when designing this intervention?

   *Note: To facilitate the validation by the partner government, development partners are invited to attach or provide the electronic link to the document describing the project/programme at approval.*

**DEFINITIONS**

| **Country Results Framework(s) (CRF)** | Country results frameworks (CRFs) define a country’s approach to results and its associated monitoring and evaluation systems focusing on performance and achievement of development results. Using a minimal definition, these results frameworks include agreed objectives and results indicators (i.e. output, outcome, and/or impact). They also set targets to measure progress in achieving the objectives defined in the government’s planning documents. In practice, government-led results frameworks defined at the country level are often broadly stated (e.g., long term vision plans, national development strategies) and operationalised in more detail at the sector level (e.g., sector strategies), where specific targets and indicators are set for a given timeframe. The definition of country-led results framework used in GPEDC Monitoring Framework allows for the possibility to use equivalent priority-setting mechanisms at the country level since not all countries articulate their priorities through consistent, integrated Country Results Frameworks. |

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3 In this context, self-assessments and project closing reports are not considered final evaluations. Development partners are invited to share the electronic document (or a scanned copy of the original document) with the national co-ordinator if the document is not available online.

4 Development partners are invited to share the electronic document (or a scanned copy of the original document) with the national co-ordinator if the document is not available online.
<p>| <strong>Country Results Framework(s) (CRF)</strong> | For the purposes of this monitoring exercise, the broad definition of CRFs and CRF-like planning instruments include: long term vision plans; national development strategies; agreed joint government-multi-donor plans; government's sector strategies, policies and plans; subnational planning instruments, as well as other frameworks (e.g. budget support performance matrices, sector-wide approaches). In contrast, planning and priority setting documents not originated within the government, such as development partners' own country strategies, are not considered country-led results frameworks. |
| <strong>Country strategy or partnership framework</strong> | A country strategy or partnership framework is a strategic document that guides the development partner support to a partner country. It is typically a five-year strategy, which defines the development approach chosen, and provides the context for the implementation, monitoring and evaluation of programmes and results. |
| <strong>Development interventions</strong> | In the context of this indicator, the term <em>development interventions</em> is used to indicate development programmes and projects indistinctively. |
| <strong>Final evaluation</strong> | Final evaluations are assessments carried out at the end of the intervention, generally focused on measuring whether the intended outcomes or impacts were achieved. Some common types of ex post evaluations include outcome evaluations, impact evaluations and objectives-based evaluations. Process evaluations (focused on identifying challenges during project implementation) can also be carried out at the end of the project. In this context, self-assessments or project closing reports are NOT considered as final evaluations. <em>Note that not all interventions need to be evaluated. For the purposes of this exercise, the indicator only assesses whether the partner country has been consulted or engaged in a final evaluation, but only if that evaluation is planned.</em> |
| <strong>National development strategy</strong> | National development strategies are overarching strategic planning tools that cover the whole-of-government. These strategies/plans are typically prepared to cover a clearly identified period of time, often covering four to eight years. The quality of these national development strategies in operational terms depends on the extent to which they constitute a unified strategic framework to guide the country's development policy and include strategic priorities linked to a medium-term expenditure framework and reflected in annual budgets. They are expected to have been developed through an inclusive consultative process involving the full range of relevant development stakeholders at country level, as to ensure legitimacy and sustainability of national development plan in the medium term. |</p>
<table>
<thead>
<tr>
<th>Participatory process</th>
<th>In the context of developing a country strategy or partnership framework, a process of engagement with other stakeholders that offers opportunities and mechanisms designed for reaching consensus on the priorities and commitments. In contrast with consultative processes, which are opportunities to input into the process, participatory processes are characterised by the co-definition of priority areas and/or targets.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority / Priority Area</td>
<td>In the context of this indicator, priority areas are sectors (e.g. education, health, transport), geographic regions, or cross-cutting issues (e.g. gender equality, anti-corruption, climate change) explicitly reflected in the country strategy or partnership framework. For the purpose of this monitoring exercise, priorities/priority areas are considered “jointly defined with the government” if they have been negotiated and agreed with the government through a consultative or participatory process.</td>
</tr>
<tr>
<td>Results framework</td>
<td>A results framework is an explicit articulation (graphic display, matrix or summary) of the different levels, or chains, of results expected from a particular intervention - project, programme or development strategy. At minimum, it contains a logical set of priorities, targets and [results] indicators. See Results indicators for more information on the latter.</td>
</tr>
<tr>
<td>Results indicators</td>
<td>Results indicators are a measure that is used to demonstrate change in a situation, or the progress in, or results of, an activity, project, or programme. While the broad definition of results indicators include outputs, outcomes and impacts, this exercise focuses on assessing only the set of outcome indicators included in the intervention's results framework. In the event that only output indicators are included, please refer to those instead. In the event the intervention did not establish any results framework, mark as zero and indicate the reason for the lack of inclusion (e.g. small technical cooperation, extension of project financing, untied transfer).</td>
</tr>
</tbody>
</table>
**INDICATOR 5A: DEVELOPMENT CO-OPERATION IS PREDICTABLE: ANNUAL PREDICTABILITY**

**WHAT THIS INDICATOR MEASURES**

This indicator measures, for the reporting year of reference, the proportion of development co-operation disbursed as development partners had scheduled at the beginning of the year.

**WHY THIS IS IMPORTANT**

Governments that benefit from predictable development co-operation can better plan and manage their development policies and programmes. It will also result in greater country ownership. By focusing on the predictability of development co-operation, this indicator recognises that shortfalls, over-disbursements in the total amount of funding for the public sector, and delays in the annual disbursements of scheduled funds can have serious implications for a government’s ability to implement its development strategies as planned.

**HOW IT IS CONSTRUCTED**

The indicator is calculated by dividing the amount of development co-operation flows dispersed by the amount of development co-operation flows scheduled for disbursement to a given country in the reporting year of reference. The reporting year of reference is the last completed fiscal year of the partner country. Results generated once the data are recorded in the excel file show the share of disbursements on schedule and also beyond schedule.

For further technical details on how the indicator is calculated please refer to the technical companion document.
STEP BY STEP GUIDANCE

1. National co-ordinators in each country that has listed your country/organisation as a development partner share the DP Excel with your focal point at country level, or your headquarters focal point if there is no country-level focal point (as it happens, for example, for global funds or smaller development partners).

2. Your focal point at country level or your headquarters focal point completes the requested data guided by the questionnaire below and the instructions contained in the reporting tool DP Excel.

3. National co-ordinator collects all data from its development partners and transfer it into the Country Excel, verifying the accuracy and completeness of the information. If adjustments are needed, national co-ordinators are encouraged to communicate with their development partners.

4. The data provided by development partners for indicator 5a is also used to calculate indicator 6. No further inputs are requested from development partners to estimate indicator 6 ("Development co-operation is on budgets subject to partner countries' parliamentary oversight").

5. Partner countries submit the aggregated data to the OECD-UNDP Joint Support Team. These country-generated data in the package is then shared with development partners' focal points at headquarters level during November-December, to give an opportunity for comprehensiveness and accuracy on the partner's programme. Suggestions and additional inputs derived from that review are sent directly to national co-ordinators, for consideration for the final country dataset.

Important note for development partners in responding to the questionnaire below:

In reporting to this indicator (and to indicator 9b), avoid a common error by noting that:

1. You are being asked about your development co-operation financial disbursements that you disbursed to the country during the country's fiscal year of reference (Qp1). This includes your direct programme with the country, but also those funds coming from your global, regional and thematic programmes that you disbursed in the particular country during the reference year.

2. You are then being asked to distinguish between your financial flows that were scheduled and directly delivered to fund your programmes and projects in the country benefiting the partner country's public sector institutions, including central and subnational governments, the legislative and judiciary branches, and other state-owned entities (Qp3 and Qp2, respectively).

3. The last question (Qp4) refers to amounts not included in Qp1 (i.e. directly delivered to the country) that were ultimately disbursed through other official development partners (e.g. Funds managed by UN agencies, multi-donor trust funds managed by another partner, delegated co-operation, etc).

4. Ultimately, from a provider perspective, Qp1 + Qp4 should amount to your total development funding programmed for the country for the reference year -- regardless of whether it was directly or indirectly delivered.

QUESTIONNAIRE

• TO BE ANSWERED BY DEVELOPMENT PARTNERS AND VALIDATED BY NATIONAL CO-ORDINATOR

Qp1. How much development co-operation flows did you disburse at country-level in the reporting year of reference? USD ________

This question covers all flows disbursed to the country, including disbursements to public sector and also direct support to non-governmental organisations, civil society, private sector and other non-state domestic actors.
Qp2. How much of this was for the public sector in the reporting year of reference? USD ______
This question covers flows disbursed only to the public sector and directly to the public sector, it does NOT include flows disbursed via other organisations. Also it does NOT include funding to projects that are directly implemented and managed by the development partner’s agency, even if the project benefits government entities and/or is in the context of an agreement with that public administration.

Qp3. How much development co-operation flows for the public sector did you schedule for disbursement at country-level in the reporting year of reference? USD ______
This question covers flows planned to be disbursed only to the public sector and directly to the public sector, it does NOT include flows planned via other organisations.

Qp4. How much development co-operation flows for the public sector did you disburse through other development partners at the country level in the reporting year of reference? USD ______
Amounts reported here are not captured in responses to Qp1-Qp3. They refer to the indirect support you provided to the country via other official bilateral and multilateral agencies.

### DEFINITIONS

<table>
<thead>
<tr>
<th>Definition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development co-operation flows</td>
<td>Official development assistance and other non-concessional official development flows. This includes all official development financial flows aiming to promote the development and welfare of partner countries.</td>
</tr>
<tr>
<td>Public sector</td>
<td>It includes government and other public sector entities. It includes ministries, departments, agencies or municipalities authorised to receive revenue or undertake expenditures on behalf of central government. It does NOT include civil society organisations, private sector entities or other non-state domestic actors.</td>
</tr>
<tr>
<td>Scheduled for disbursement</td>
<td>Includes development co-operation amounts that the development partner had communicated to the government at the outset of the reporting year to be disbursed in the country to the benefit of / for public sector institutions by the end of that reference year. Development co-operation funding scheduled for the reporting year of reference are considered to have been “scheduled for disbursement” when notified to government within the reporting year of reference or any time before that.</td>
</tr>
<tr>
<td>Reporting year of reference</td>
<td>The reporting year of reference is the last completed fiscal year of the partner country.</td>
</tr>
</tbody>
</table>
INDICATOR 9B: DEVELOPMENT PARTNERS USE COUNTRY SYSTEMS

WHAT THIS INDICATOR MEASURES

This indicator measures the proportion of development co-operation disbursed to a given country that is managed using the partner country’s national norms, procedures and systems for budget management and execution, financial reporting, auditing and procurement – instead of using the development partner’s own norms, procedures and systems. This indicator does not measure the amount of budget support (even if budget support and similar modalities are often the easier way to use all four country systems).

WHY THIS IS IMPORTANT

When countries’ own procedures and systems are used in the delivery of development co-operation, there is a potential pay-off of increased investment in strengthening these systems, coupled with improved efficiency, ownership of the development programmes delivered. The use of country systems allows development programmes to be integrated better with countries’ own expenditure, reducing duplication of effort and increasing the leveraging effect of development co-operation resources and the sustainability of activities and results.

HOW IT IS CONSTRUCTED

This indicator is calculated by dividing the amount of development co-operation flows that use country systems and procedures by the total amount of development co-operation disbursed to the public sector in the reporting year of reference. These data are presented in two ways:

- **For each development partner:** The results will show the proportion of development co-operation disbursed using partner countries’ various public financial management systems and processes, for: a) budget execution procedures; b) financial reporting procedures; c) auditing procedures, and d) procurement systems. An average score will present the average use of country systems, to compare with previous scores since 2005.
- **For each partner country:** The results will show the share of development co-operation (received by the partner country from all its development partners) using the country’s own: a) budget execution procedures; b) financial reporting procedures; c) auditing procedures, and d) procurement systems. An average score will present the average use of country systems by partners, as compared with prior measurements in the country.

For further technical details on how the indicator is calculated at global level please refer to the technical companion document available at the dedicated 2018 monitoring round website.

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1 The indicator does not measure whether funds are “on-budget” but whether they were disbursed relying on partner countries’ own budgetary norms and systems for expenditure management, as opposed to development partners’ own corporate policies (e.g. separate bank account, authorisation process for expenditures).
STEP BY STEP GUIDANCE

1. National co-ordinators in each partner country participating in the monitoring round will share the DP Excel with your contact point at country level, or with your headquarters focal point if you do not have country level focal point or presence.

2. The focal point at country level (or the headquarters focal point) will gather the necessary data to fill the requested entries, guided by the questionnaire below and the instructions contained in the DP Excel.

3. Development partners input the requested data in the DP Excel, guided by the questionnaire, explanations and definitions below. Please check all three to ensure that you report correctly and avoid iterations later on.

4. National co-ordinators verify the accuracy and completeness of the information.

5. National co-ordinators may discuss with development partners if observations and adjustments are deemed necessary during the validation and review process.

6. Once verification has taken place, the national co-ordinator transfers development partners’ data into the Country Excel, prior to submission to the OECD-UNDP Joint Support Team.

7. The OECD-UNDP Joint Support Team includes these country-generated data in the package shared with development partners’ focal points at headquarters level, to give an opportunity for comprehensiveness and accuracy on the partner’s programme. Suggestions and additional inputs derived from that review are sent directly to national co-ordinators, for consideration for the final country dataset.

QUESTIONNAIRE

• TO BE ANSWERED BY DEVELOPMENT PARTNERS AND VALIDATED BY NATIONAL CO-ORDINATOR

In the reporting year of reference, how much development co-operation funding disbursed for the public sector used...

Qp1. …national budget execution procedures (USD)? ________
Qp2. …national financial reporting procedures (USD)? ________
Qp3. …national auditing procedures (USD)? ________
Qp4. …national procurement systems (USD)? ________

An open-ended comment box will allow partners to provide more detail on current internal or external obstacles in using these country systems to channel their development co-operation funding – with the aim of informing dialogue with the government on ways to address these bottlenecks.

DEFINITIONS

| Use of national budget execution procedures | Development partners use national budget execution procedures when the funds they provide are managed according to the national budgeting procedures established in the general legislation and implemented by government in the partner countries. This means that programmes supported by development partners are subject to normal country budgetary execution procedures, namely procedures for authorisation, approval and payment. |

Mini Guide for Development Partners
| Use of national budget execution procedures | Development partners are invited to review all their development cooperation activities with a view to determining how funding for the government sector meets three out of the four criteria below (anything less does not qualify):

1. Are your funds included in the annual budget approved by country legislature? (Y/N)
2. Are your funds subject to established country budget execution procedures? (Y/N)
3. Are your funds processed (e.g. deposited & disbursed) through the established country treasury system? (Y/N)
4. You do NOT require the opening of separate bank accounts for your funds? (Y/N). 1 |

| Use of national financial reporting procedures | Legislative frameworks typically have provisions for specific types of financial reports to be produced as well as periodicity of such reporting. The use of national financial reporting means that development partners do not impose additional requirements on governments for financial reporting. In particular development partners do NOT require: i) maintenance of a separate accounting system to satisfy the development partner's reporting requirements, and ii) creation of a separate chart of accounts to record the use of funds from the development partner. Development partners are invited to review all their development activities with a view to determining how much funding for the government sector meets BOTH criteria below (anything less does not qualify):

1. You do NOT require maintenance of a separate accounting system to satisfy your own reporting requirements? (Y/N)
2. You ONLY require financial reports prepared using the country's established financial reporting arrangements? (Y/N) |

| Use of national auditing procedures | Development partners rely on the audit opinions, issued by the country's supreme audit institution, in the government's normal financial reports/statements as defined above. The use of national auditing procedures means that development partners do not place additional auditing requirements on governments. |

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1 *Budget execution* — Yes: you do not require opening separate accounts. No: you do require opening separate accounts.

| Use of national budget execution procedures | Development partners are invited to review all their development activities with a view to determining how much development co-operation funding for the government sector meets **BOTH criteria** below:

1. Are your funds subject to audit carried out under the responsibility of the Supreme Audit Institution? (Y/N)
2. You do **NOT** under normal circumstances request additional audit arrangements? (Y/N)

**AND at least one of the two criteria** below:

3. You do **NOT** require audit standards different from those adopted by the Supreme Audit Institution? (Y/N)
4. You do **NOT** require the Supreme Audit Institution to change its audit cycle to audit your funds? (Y/N)

| Use of national procurement systems | Development partners use national procurement systems when the funds they provide for the implementation of projects and programmes are managed according to the national procurement procedures as they were established in the general legislation and implemented by government of the partner country. The use of national procurement procedures means that development partners do not make additional, or special, requirements on governments for the procurement of works, goods and services (where weaknesses in national procurement systems have been identified, development partners may work with partner countries in order to improve the efficiency, economy, and transparency of their implementation).

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1 Note: where development co-operation funding is provided to parastatal entities (for example, public enterprises) and these entities are not subject to audit by the Supreme Audit Institution, the following criteria should be considered:

Development partners are invited to review all their development activities with a view to determining how much development co-operation funding for the government sector meet **BOTH criteria** below:

1. Are your funds subject to audit carried out under the regular audit procedures established for the audit of parastatal entities? (Y/N)
2. You do **NOT** under normal circumstances request additional audit arrangements? (Y/N)

**AND at least one of the two criteria** below:

3. You do **NOT** require audit standards different from those adopted by the parastatal entity for the audit of parastatal entities? (Y/N)
4. You do **NOT** require a change in the audit cycle of the parastatal entity to audit your funds? (Y/N)

2 Reserving the right to make an exceptional audit (e.g. when fraud or corruption is discovered) does not count against this criteria.

3 Yes: development partners do not require additional audits. No: development partners do require additional audits.

4 Yes: development partners do not require different audit standards. No: development partners do require different audit standards.

5 Yes: development partners do not require to change the audit cycle. No: development partners do require change to the audit cycle.
INDICATOR 7: MUTUAL ACCOUNTABILITY AMONG DEVELOPMENT ACTORS IS STRENGTHENED THROUGH INCLUSIVE REVIEWS

WHAT THIS INDICATOR MEASURES

The indicator measures whether countries have established inclusive mutual assessment reviews, characterised by five dimensions: (i) a policy framework that defines the country’s development co-operation priorities; (ii) targets for the country and its development partners; (iii) regular joint assessment against those targets; (iv) active involvement of other stakeholders; and (v) public availability of the results of these reviews.

WHY THIS IS IMPORTANT

Development impact is enhanced when all parties are mutually accountable and take responsibility for delivering on their respective commitments and contributions.

Mutual assessments – when regular, results-oriented, transparent, and inclusive of all relevant development actors – can help enhance transparency and mutual accountability at country level. This in turn creates incentives for actors to meet commitments made to each other, improve their ways of working together, and increase their development effectiveness.

HOW IT IS CONSTRUCTED

The questionnaire, reported by partner countries directly, assesses whether countries have have effective mutual assessment reviews in place when at least four out of five building blocks are met. Details on that questionnaire can be found in the 2018 monitoring guide for national co-ordinators.

Development partners are invited to provide complementary information for indicator 7, focusing on questions Qp1 and Qp2 below. Their multiple experiences in participating in country-level co-ordination arrangements with the government and other partners, as well as their assessment on the capacity of those country-level structures to steer better and more inclusive partnerships for sustainable development are critical to identify challenges and opportunities for the successful implementation of the 2030 Agenda for Sustainable Development.

For further details on how the indicator is calculated please refer to the 2018 Monitoring Guide for National Co-ordinators and the Technical Companion document, both available at www.effectivecooperation.org/2018monitoring.
For this indicator, partner countries are responsible for reporting on the ‘main questionnaire’ (not shown here):
1. National co-ordinator from partner countries should answer a questionnaire in their own reporting tool (Country Excel), choosing the level that best describes the current situation in the country for each question.

Development partners provide complementary information to the indicator:
2. Development partners reflect their experience and views on current arrangements for co-ordination and accountability at country level in the DP Excel shared by the partner country’s national co-ordinator.
3. Once the DP Excel has been returned to the national co-ordinator, the national co-ordinator transfers development partners’ responses into a dedicated section within the Country Excel.

QUESTIONNAIRE

• TO BE ANSWERED BY DEVELOPMENT PARTNERS (NO PARTNER GOVERNMENT VALIDATION NEEDED)

Qp1. In the past 2 years, has your organisation joined mutual assessments of progress with the government and/or other development partners in the country? [See options in the DP Excel]

Qp2. How effective were such reviews in informing the ways of working in the country to improve ownership, inclusiveness, focus on results, and increase transparency and accountability? [See options in the DP Excel]
### DEFINITIONS

| **Policy framework for development co-operation and multi-stakeholder partnerships** | A policy document (or series of policy documents) which sets out the country's agreed approaches to the delivery of international development co-operation and the establishment of multi-stakeholder partnerships, containing agreed principles, processes and/or targets designed to improve its effectiveness. This may take the form of a stand-alone policy or strategy document, or may be addressed within another document (for example, as part of a national development strategy or implementation framework). The framework may define roles and responsibilities of various stakeholders, following an inclusive consultation between government officials, development partners and other interested development stakeholders. |
| **Country-level targets for effective development co-operation** | Country-level targets for effective development co-operation are jointly established between partner country governments and relevant development stakeholders as a basis for assessing the performance of partners on the effectiveness of development co-operation. The targets could be either drawn from internationally-agreed principles and commitments or developed through national processes. The targets could be applicable to different types of development co-operation and a wide range of actors such as bilateral and multilateral partners, civil society organisations, private sector, or foundations. |
| **Mutual (or ‘joint’) assessment of progress towards development co-operation targets** | Mutual assessment(s) of progress in effective development cooperation are national level exercises that are led by the partner country government and involve a range of development partners in a joint review of performance according to the country-level targets. |
| **Regular mutual assessment** | The review is considered to be regular if it was conducted with senior level political buy-in to inform development planning and decision-making processes in the past two years. |