

MONITORING, EVALUATION & LEARNING – PSF GUIDANCE

To ensure our investments and projects are contributing to social cohesion, the PSF is changing its approach to monitoring, evaluation and learning (MEL).

Our new approach aims to support you to adapt to a changing context, yet also to be rigorous enough to help us all understand how projects are – or are not – contributing to change. There is not a one-size fits all MEL system for our partners, but we do need shared commitment to the broad steps outlined below.

We do not expect partners to have developed a detailed approach to MEL before receiving an implementation agreement. Each project will have an initial period where PSF can work with you to develop a fit for purpose MEL system. For the purposes of the concept note or full proposal, please demonstrate you have thought seriously about the steps below.

1. Articulate a Plausible Theory of Change

Applicants should develop a plausible theory of change (TOC) within the project team and the PSF, using the supplied guidance. Keep it real and avoid heroic assumptions! This should align with and help test PSF's overarching theory of change, while also showing how a specific problem will be understood and tackled. You should show how you will test your TOC with key stakeholders, ideally through inception activities and research. Over the longer term, you will need to plan to hold regular meetings to ask: are we doing things well and are we doing the right things? After these meetings you can fill in a theory of change revision template (see TOC guidance).

2. Identify Key Performance Criteria and Standards

Each of our partners will need a more detailed MEL system for certain key performance areas of the project. These areas should be those elements of a project which are critical to success, alongside a mandatory focus on learning and adaptation, gender equality and social inclusion. During the initial phase of each project, PSF will work with you to develop a scale to assess progress in these areas, to allow depth of reporting and to maintain flexibility.

3. Identify Learning questions

You should develop key questions you wish to answer about project impact and how the context is changing. Those about project impact ask a specific version of 'What change did we contribute to?', whereas those about the issue/context ask a specific version of 'What are you learning about the specific issue or context that can improve your project or others?' In order to answer these questions, we expect you will use their own observations, alongside quantitative or qualitative methods.

4. Integrate Gender Equality & Social Inclusion (GESI) & Conflict Sensitivity

Consider GESI in developing your theory of change. Ensure you are collecting gender, age and disability disaggregated data in your monitoring activities, so you know how inclusive you are being and where you

can make changes to improve. You should aim for your MEL activities, including evaluation plans, to be gender transformative, inclusive and participatory. Integrate GESI into your learning questions: what do you want to learn about gender dynamics and social exclusion of marginalized groups to improve your programming? Furthermore, there will be times where we want to ask questions and collect data but cannot or should not due to risks associated with conflict sensitivity. For example, data collection may become more sensitive closer to the 2020 elections, putting enumerators and respondents at risk of backlash. In your MEL plans, please consider both risks and opportunities in this regard, drawing on our GESI and conflict sensitivity guidance.

5. Budget for MEL

You should ensure you request a budget and resources so that you can do MEL to a high standard. The PSF will provide funds for a specific MEL officer for all long-term funded national organisations. Where organisations have existing MEL processes and resources, PSF will provide earmarked funds to allow them to continue to develop, including across other projects. PSF will conduct trainings and support, bringing in additional expertise as agreed and deemed necessary.

6. Identify Options for Measurement

A range of information will be needed to ensure your project is working well and contributing to change:

- **Basic monitoring data:** All partners must provide data on activities, participants (broken down by age, gender, youth and other marginalized groups as relevant) and reach. This may be verified by PSF. We have an activity tracking template you can use.
- **Logframes:** PSF will not always require logframes, so long as you have a transparent way of tracking your theory of change, activities, performance and answers to learning questions. A baseline and end-line may be appropriate for well-planned, larger and longer-term projects. PSF will accept process indicators where they support an adaptive way of working.
- **Performance standards and learning questions:** How you measure performance and answer learning questions depends on what method is most appropriate. It is likely to include observation, participant feedback, surveys, interviews and FGDs. PSF will support you to use appropriate techniques, such as Most Significant Change.
- **Facility level requirements:** PSF has its own theory of change, learning questions and logframe. In conversation with you during your project set up, we will discuss which parts of these are most relevant for the project, and how we can combine our MEL needs.

7. Demonstrate Effective Data management

So that reliable data is captured and reported, you will require a fit-for-purpose system to ensure good data **quality, storage and use**. At its simplest, this will mean having a clear way to store data, an excel spreadsheet tracking monitoring data and any agreed indicators, and qualitative information on performance, evaluative and learning questions captured in word templates.

8. Link MEL to Decision-Making and Course Correction

Setting clear timelines for data collection, analysis and response is important for PSF and your team to hold each other to account. Using MEL information for decision making requires clear and transparent reporting timelines. Expected reporting timelines are:

- **Quarterly:** reports that include basic activity monitoring, reflections on theory of change, updates on any data tracking/logframe, initial learning question reflections.
- **6-monthly:** deeper reflection on theory of change and learning questions, linked to any 'most significant change' observed.
- **Annually:** Participation in shared MEL event with other relevant partners.

Based on experience, we expect that some information will need to be received informally (e.g. over the phone). PSF is flexible enough to allow this. You will need to hold regular meetings where MEL information can be used to discuss progress and challenges, which PSF may wish to participate in, with your permission.

9. Engage in Evaluation Processes that are Useful to Projects

The PSF is open to considering different and creative evaluative methods, depending on the project, in consultations with you. For example:

- **Formative evaluation:** PSF will often use evaluations to help improve our projects in real-time, rather than only at the end. That may mean commissioning evaluation support earlier in a project, with a consultant providing longer-term support to you to implement findings.
- **Summative evaluation:** PSF will also use evaluations to assess the impact of programmes. To be done well this will often involve evaluators working with a project from an early stage. This may be an impact evaluation, or theory-based.

We expect evaluations to be targeted around specific questions rather than generic evaluation criteria. PSF will support you to develop partnerships with researcher or evaluation organizations for rigorous evaluation, although will not be able to fully fund higher cost initiatives. PSF partners which engage in close collaboration with each other may be evaluated together.

10. Learn with Others

All of our partners have a wealth of knowledge and the PSF seeks to learn from you and to support you in learning from each other. As such, PSF will convene partners based on existing collaborations, issues or geographies. PSF is open to suggestions for collaborations, such as partners forming mentoring or coaching relationships.

Contact and Support

The PSF team can be contacted for support in relation to reflecting MEL in your application. Just email Khin Zar Hline, MEL Officer, at kzh@paungsiefacility.org

Please also see PSF guidance on conflict sensitivity, GESI and risk management.