

MONITORING, EVALUATION & LEARNING – PSF PROPOSAL GUIDANCE

PSF's monitoring, evaluation and learning (MEL) approach aims to be flexible and rigorous. There is not a one-size fits all MEL approach for our partners.

A **MEL plan** is a written document covering the key parts of what you will do, how it will be managed, and what it will cost. A **MEL framework** is a table in word or excel which includes your **learning questions**, methods, tools and measures. At **concept note** stage, we do not expect a MEL plan or framework, but you should consider the below in your application. At **full proposal** stage, we expect a draft plan and framework, which we can work with during your **inception period**.

The following summarizes the **five steps** to consider in developing your MEL:

1. Theory of Change

Develop a plausible theory of change, using PSF guidance. This means carefully analysing the specific problem you want to tackle, what you will do to create change, and any key context or causal assumptions. You should be expecting to test the different parts of your theory of change over time.

2. MEL Framework

Using your theory of change as a basis, you should develop your own MEL framework. Your MEL framework should clearly show what information you need, how you will collect it, and whether your project is making progress. We expect creativity. For example, rather than setting out standard outcomes, outputs and activities in a logframe, some partners have set out different scenarios based on their activities (positive and negative) and tracked progress on them. Once a project starts, all frameworks should be turned into a **MEL tracker**, which monitors your MEL activities and findings. If you would like examples of MEL Frameworks and Trackers, please contact PSF.

3. Learning Questions

Monitoring should review the context and problem, activities, project progress and assumptions. In doing so, it is best to start with the questions you have about each, what we call 'learning questions'. Then you need to decide which methods can help you answer them, and then any specific measures. Partners should consider qualitative and quantitative methods, alongside any key indicators. Learning questions should be part of your project MEL framework.

4. Learning and adaptation

Using MEL information for decision making requires clear and transparent reporting timelines. We recommend agreed moments for reflection as well as ad hoc, when new and interesting information is found, or analysis is conducted. We strongly encourage cross-partner collaboration, networking and learning. This can be supported financially and technically as part of your proposal.

5. Cross-cutting issues

Consider gender equality and social inclusion (GESI) in developing your theory of change. Ensure you are collecting gender, age and disability disaggregated data in your monitoring activities. You should aim for your MEL activities, including evaluation plans, to be gender transformative, inclusive and participatory. Similarly, conflict sensitivity should be integrated into your theory of change and MEL. This means ensuring MEL activities ‘do no harm’, while also tracking how your project contributes to connectors and dividers in your project location. Following our [guidance online](#), ensure your MEL is COVID-19 sensitive.

PSF has some **minimum standards and timelines** on MEL which all grantees must adhere to:

Requirements	Details										
Monitoring data	<p>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.</p> <p>Facility level requirements: PSF has its learning questions and logframe. During your inception phase, we may request additional collaboration on these.</p>										
Budgeting	<p>PSF will fund a MEL officer for all long-term funded national organisations, separate from the funds below. Projects must ear-mark a MEL budget, estimated as below:</p> <table border="1"> <thead> <tr> <th>Project size (USD)</th> <th>Average MEL funds (USD)</th> </tr> </thead> <tbody> <tr> <td>0 – 250,000:</td> <td>18000 (M=3000; E=12000, L=3000)</td> </tr> <tr> <td>250,001 - 500,000:</td> <td>24000 (M=4500; E=15000, L=4500)</td> </tr> <tr> <td>500,001 - 1,000,000:</td> <td>33000 (M=5250; E=22500, L=5250)</td> </tr> <tr> <td>1,000,000</td> <td>44000 (M=7000; E=30000, L=7000)</td> </tr> </tbody> </table> <p>This above- mentioned amount should be maximum and may differ per project, depending on the type, scale and location of activities.</p> <p>The monitoring and learning budget should be spread evenly across the years.</p> <p>The evaluation budget should have 33.3% in Year 2 and 66.7% in Year 3.</p>	Project size (USD)	Average MEL funds (USD)	0 – 250,000:	18000 (M=3000; E=12000, L=3000)	250,001 - 500,000:	24000 (M=4500; E=15000, L=4500)	500,001 - 1,000,000:	33000 (M=5250; E=22500, L=5250)	1,000,000	44000 (M=7000; E=30000, L=7000)
Project size (USD)	Average MEL funds (USD)										
0 – 250,000:	18000 (M=3000; E=12000, L=3000)										
250,001 - 500,000:	24000 (M=4500; E=15000, L=4500)										
500,001 - 1,000,000:	33000 (M=5250; E=22500, L=5250)										
1,000,000	44000 (M=7000; E=30000, L=7000)										
Data Management and Security	<p>So that reliable data is captured and reported, you will require a fit-for-purpose system to ensure good data quality, storage and use. You must have a clear way to store data, an excel spreadsheet tracking monitoring data and qualitative data captured in word or online systems. You should also consider the cost for data management tools when prepare budgeting for MEL.</p>										
Reporting Timelines	<p>Quarterly: Partners submit quarterly reports, with activity tracker and MEL tracker.</p> <p>6-monthly: Deeper reflection on theories of change and learning questions. Participation in shared MEL event with other relevant partners.</p> <p>Annually: Submission of annual report, with one significant change case study.</p> <p>PSF accepts that some sensitive information may be shared in person or by phone.</p>										
Evaluation	<p>The PSF supports creative evaluative methods. They may take place at any point during the project. Evaluations will be targeted around specific questions rather than generic evaluation criteria. PSF partners which engage in close collaboration with each other may be evaluated together. All evaluation consultancies are subject to sign-off from PSF’s MEL team. External consultants for evaluation must be chosen in collaboration with PSF, and we maintain the right to retain the evaluation funds.</p>										

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.

Note: this is Version 2 of our guidance, updated on 19th May 2020.