

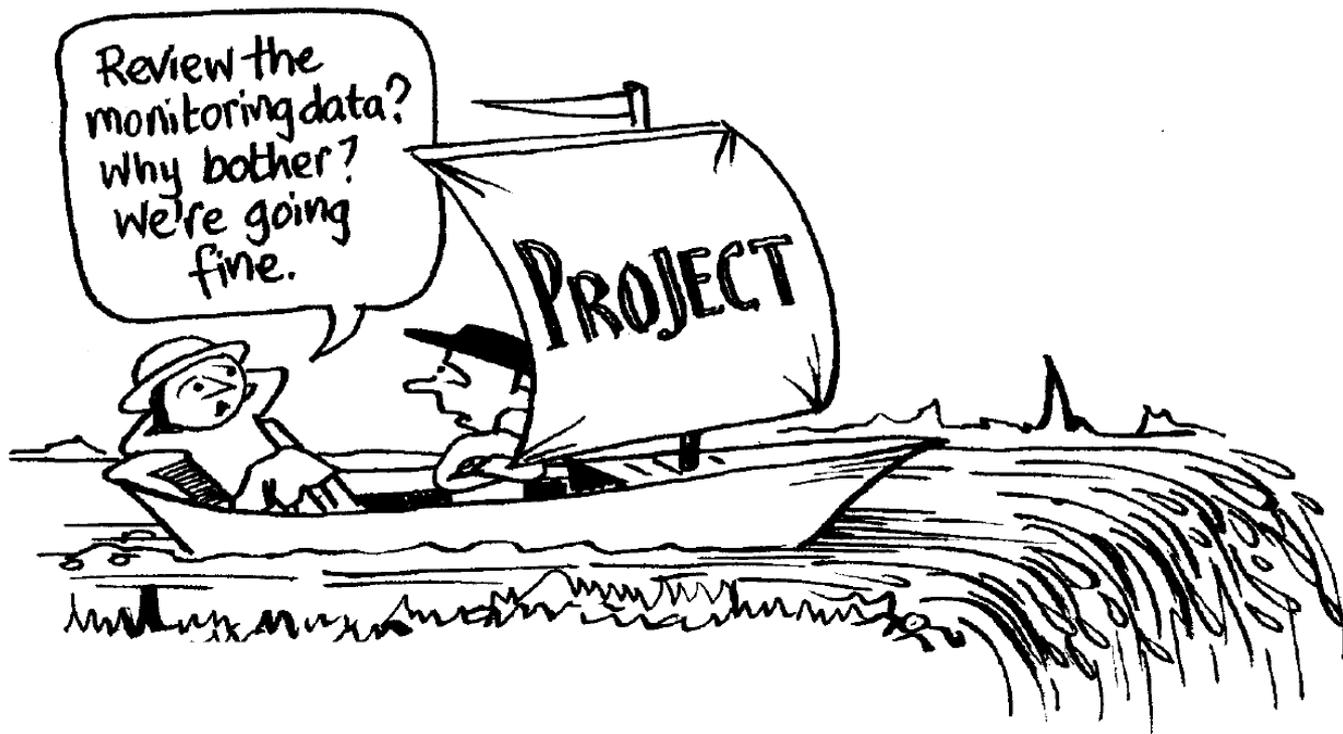


2018 USAID/Jordan MEL Conference

The Role of M&E in Grantmaking: Finding the Balance

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REMEMBER M&E INFORMATION IS USEFUL
ONLY IF IT IS USED!

Questionnaire

- Do you give grants?
- Are you responsible for M&E of grants?
- What are your most common challenges when monitoring grants?

MEL is Embedded in USAID Program Cycle Principles

The following principles serve as the foundation for the successful implementation of the Program Cycle:

- A. Apply Analytic Rigor to Support Evidence-based Decision-Making.** USAID's decisions about where and how to invest foreign assistance resources should be based on analysis and conclusions supported by evidence. Analysis refers to formal assessments, evaluations, and studies conducted by USAID.

- B. Manage Adaptively through Continuous Learning:** To do this, the Agency must create an enabling environment that encourages the design of more flexible programs, promotes intentional learning, minimizes the obstacles to modifying programs, and creates incentives for learning and managing adaptively. Learning can take place through a range of processes and use a variety of sources such as monitoring data, evaluation findings, research findings, analyses, lessons from implementation, and observation.

Source ADS Chapter 201 Program Cycle Operational Policy, Program Cycle Principles. Effective Date: 09/07/2016

Why M&E in Grantmaking?

From your experience, please write on the cards what do you think is the added value of MEL in Grantmaking from:

- Donor perspective
- Grantee perspective

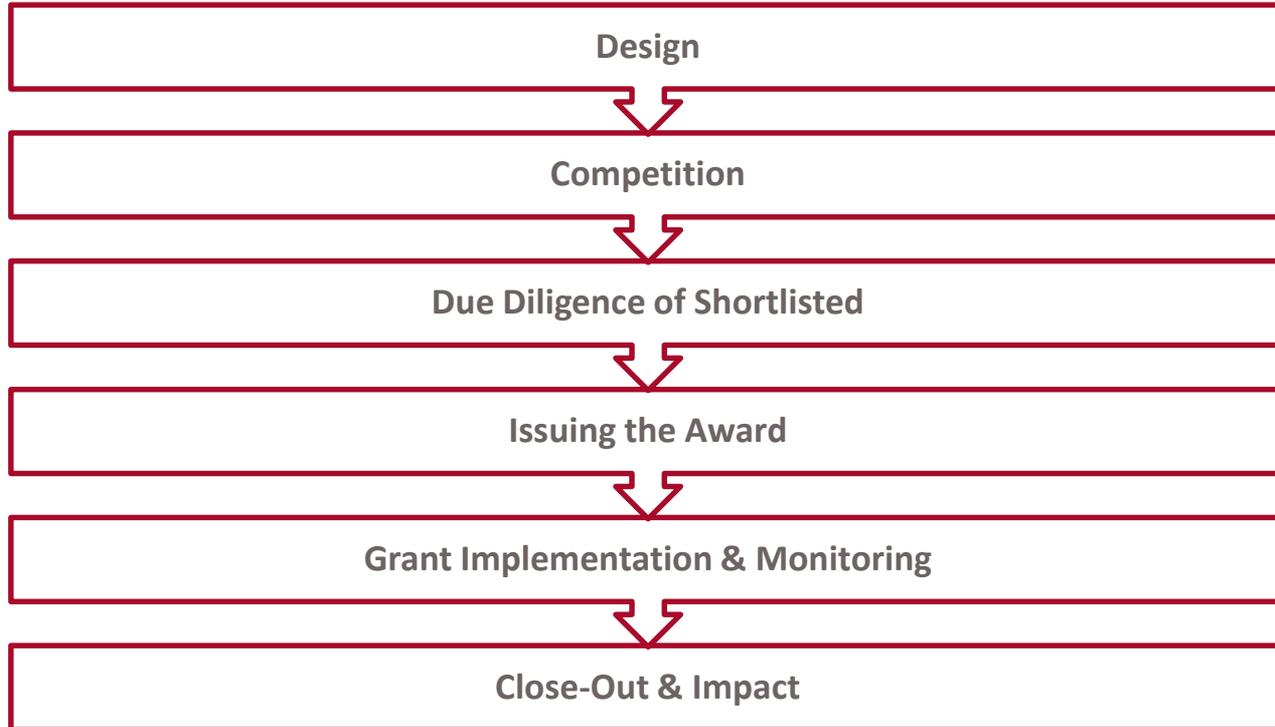
Let's put up the cards on the flipcharts

Donors	Grantee
<p>Need has been enhanced for grant-level data to inform decision-making and demonstrate progress toward Activity & USAID goals and targets. supported by donors</p>	<p>Stronger design of programs: assess that your project is achieving set targets & understand whether strategic changes need to be made</p>
<p>Report accurate, timely and comparable data that can be used to strengthen programs</p>	<p>Better communication of results: M&E provides instruments to communicate with donors and the wider public throughout the implementation of the project.</p>
<p>Stronger framework for grant monitoring, allows greater oversight of the activities</p>	<p>Accountability : Shows how the origination is administering a given budget or implementing a project.</p>

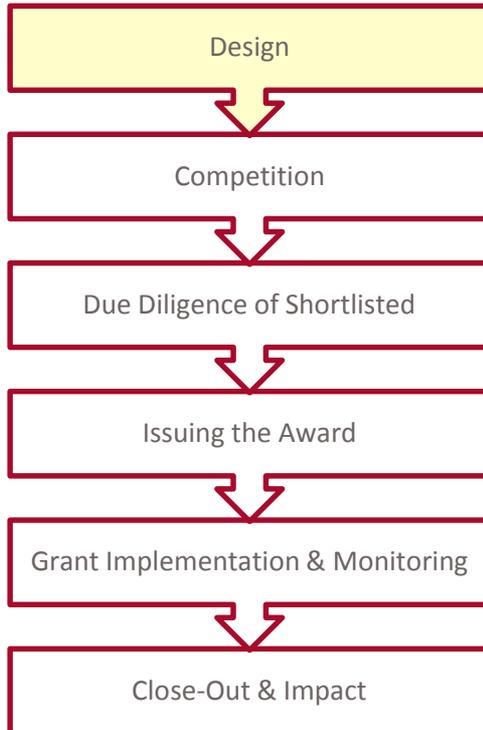
DEBATE: MEL Requirements in Grant Proposals

Is requiring a detailed M&E plan in a grant application a direct indication of a good idea even though quality of the plan and capacity of the applicant may not be strong enough?

M&E in the Grant Lifecycle

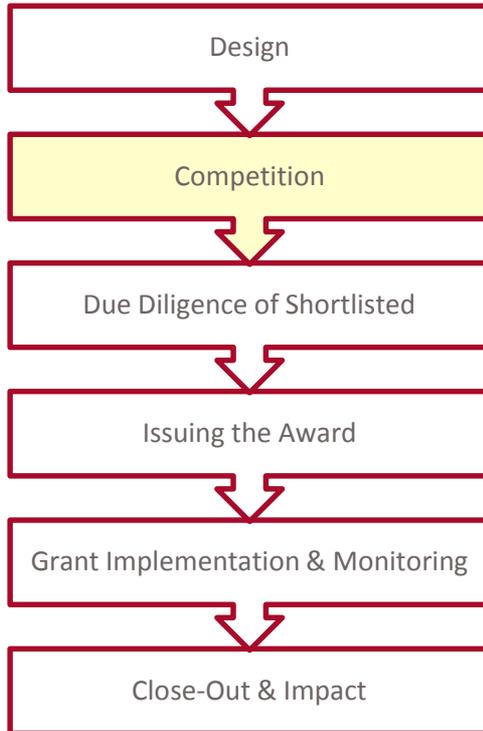


M&E in the Grant Lifecycle



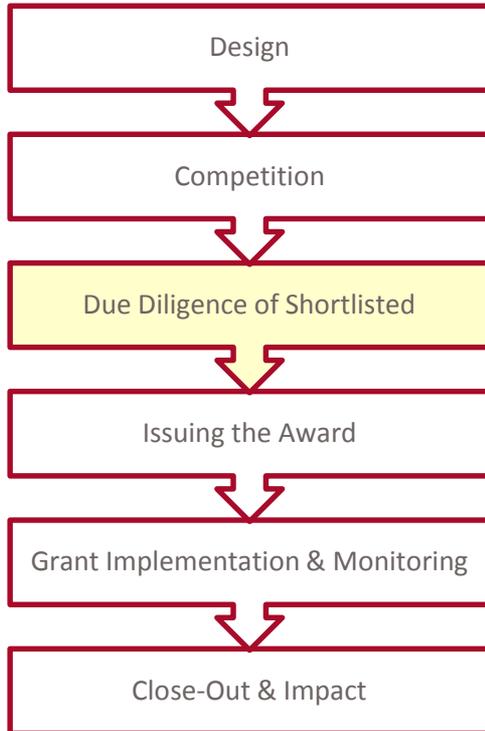
- Consider flexible design based on capacity of grantees.
- Be creative! With smaller organizations ask for a concept note or a video before the completed proposal to allow you to reach new groups and find good ideas.
- M&E is incorporated in the design of the grant: M&E requirements are outlined clearly and grantee contribution to USAID mission indicators is part of the reporting.

M&E in the Grant Lifecycle



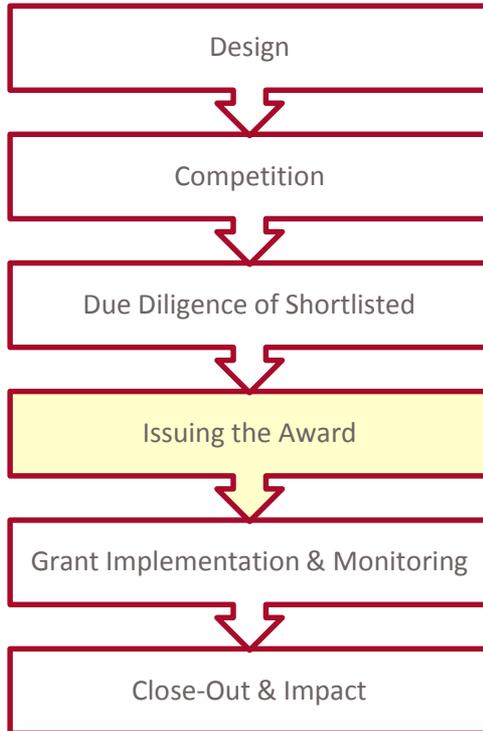
- Evaluation criteria is clear and responds to the design of the solicitation (RFP)
- Ask for less, M&E plans will change down the line and targeting is inaccurate at the proposal stage.
- Use M&E questions to understand anticipated results without asking for a full results framework
 - *What's the problem your project is addressing?*
 - *Provide a summary of your proposed project goal, objectives, activities (intervention), outcomes, expected results*

M&E in the Grant Lifecycle



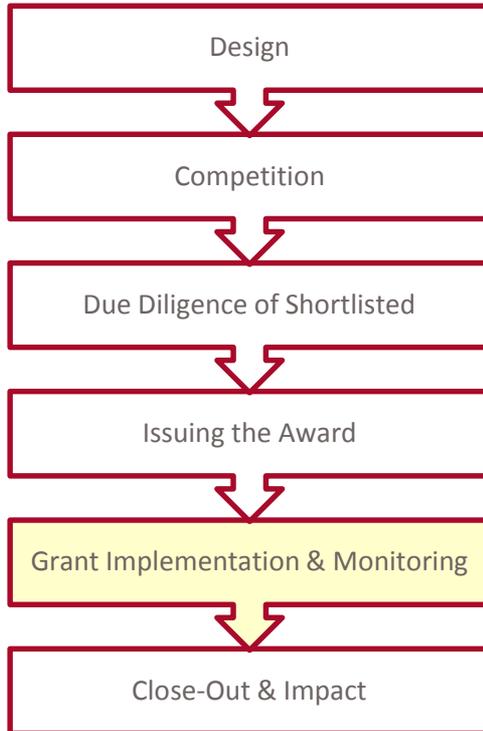
- Learning Needs and Resource Assessment LNRA prior to training helps shape the training design and content.
- Pre award M&E Capacity Building to build grantee understanding of basic M&E concepts and grant reporting requirements
- Revisit “problem statement” and conduct a problem analysis. Proposed **Solutions** to the problem are **Results**.
- Develop Theory of Change with grantees based on the grant concept and proposal.
- Develop first draft of Results Framework and specific Indicators.
- Assign USAID mission indicators
- Target-setting based on action plan and budget
- Provide guidance on “quality” of data, supporting documents, and required disaggregation (gender, age group)

M&E in the Grant Lifecycle



- Finalize and approve M&E package: complete results framework with grant-specific and USAID specific indicators
- Include special award condition for M&E reporting

M&E in the Grant Lifecycle



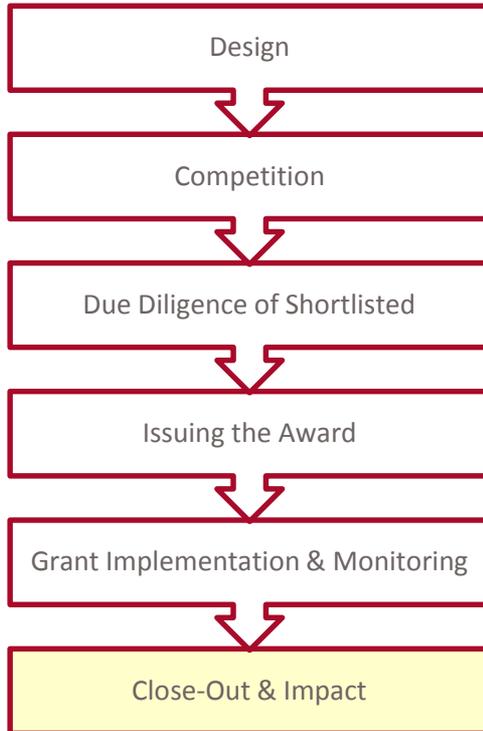
How can I trust grantee data to include in my AMELP?

- Attend grantee events
- Conduct spot checks
- Verify numbers by requiring sign in sheets, meeting agendas, and photos as supporting documentation for numbers
- Conduct monthly refresher meeting to address reporting gaps and data quality issues.
- Provide templates for sign in sheets that include gender and age disaggregated data

Grantee Testimonials

- *“Following the qualitative research workshop and the stakeholder analysis, we discovered that we have been doing was not focus groups, now we know the right structured way of doing it!”*
- *“The design of your technical assistance is proactive, you are with us every step of the way”*

M&E in the Grant Lifecycle



Building Grantee Capacity to Evaluate their Impact

Why?

- Enable grantees to evaluate their impact and tell their story of change
- Feed into IP reporting and aggregate analysis of thematic areas

How?

- Line item built into grantees budgets for conducting end of project evaluation
- Capacity building in the area of designing, managing, and procuring evaluations.
- Participatory approach in developing evaluation scopes.
- Evaluation deliverables are submitted as a requirement.
- Cover grantee projects under thematic evaluations based on sectors and scopes.

USAID CIS Lessons Learned

M&E as a tool for flexible and adaptive programming within grants

- **One size does not fit all:**
 - M&E requirements are customized to match the capacity of organizations and the scope of grants.
- **Be Creative:**
 - M&E capacity building covers more than indicators and results framework. Problem analysis, stakeholder analysis, qualitative research all feed into a strong M&E plan.
- **Get people involved strategically:**
 - Enabling grantees to evaluate their work gives donors access to more reliable data and helps tell a better story of “change”.

USAID CIS Lessons Learned

- **M&E system-strengthening contributes to organizational sustainability:**
 - Technical assistance and mentoring on strategic planning processes that include the development of M&E Plan
- **Supporting CSOs to shift from “requirements” to “ownership”**
 - Ensures they will commit the resources required to integrating learning into their work in line with their strategic plans

USAID CIS M&E Resources

- Organizational M&E Fundamentals Training Curricula *(Arabic/English)*
- Guide to Designing and Managing an End of Project Evaluation for Grantees *(English only)*
- A Step-by-Step Guide to Focus Group Research for NGOs *(Arabic/English)*
- Societies Toolkit 2.0 *(Arabic only)*

Note: All resources available on K@MP!

Thank You!

