

Event Summary

Investing in Monitoring Evaluation and Learning (MEL)

Tuesday 8th July 2014, Amigo Hall, St George's Cathedral

Report: <http://www.bond.org.uk/investing-in-mel>

A three-hour event was held to discuss the findings and implications of the research study: 'Investing in Monitoring, Evaluation and Learning: issues for NGOs to consider'. This was commissioned by the Department for International Development (DfID), Comic Relief, the Big Lottery Fund, Bond and NIDOS. Seventy NGOs, including three case study organisations, participated in a Q and A session after the presentations..

Sam McPherson (ITAD), part of the team that researched and wrote the Investing in MEL [report](#), opened the event with a short [presentation](#) sharing its key findings, conclusions and recommendations. The team found that most funding for MEL comes from restricted project budgets, but this is rarely sufficient because NGOs fail to understand their full costs and/or fail to budget for them. Committed leadership was identified as an important factor in those NGOs that have invested their unrestricted income in the longer-term strategic development of MEL systems.

Kerry Dixon shared Signpost International's experience of contributing to the report as a case-study organisation. He reported that they were surprised at how much they invested in MEL (a significant amount given their relatively small turnover) and suspected that they had been underplaying their costs for fear of appearing uncompetitive in the eyes of donors. Signpost International are using the findings to better understand their costs to reflect on efficiencies and to put in place processes to achieve full costs recovery. Kerry felt that the process had benefitted them by requiring them to take a strategic view on the reasons for MEL.

Joanna Monaghan (Comic Relief) explained that 'donors don't have all the answers' and that they are trying to support the sector to take the initiative. Drawing on the findings of the report, she explained that Comic Relief don't allocate a limit to MEL spending (preferring to invite grantees to justify their budgets) and now offer 2 days of free 1-2-1 MEL consultancy for organisations that reach stage 2 of their grant application process – with the aim of helping organisations to design effective MEL systems into their projects and budgets from the start. Joanna also explained that the MEL teams within Comic Relief, Big Lottery and DFID meet regularly and are working to harmonise their 'ask' and expectations from grantees.

Caroline Hoy emphasised that DFID is conscious that its MEL requirements impact on small organisations because pressures flow down the aid chain. She cited the Programme Partnership Arrangements (PPAs) as evidence that DFID understands the value of supporting organisations at a strategic level, but highlighted the need to evidence and justify this approach. Caroline also called on NGOs to have the confidence to defend their MEL to DFID in cases where they have well thought-out reasons for their approach: she welcomes being challenged in such circumstances.

Peter Bailey explained that BIG Lottery offers guidance that 5-10% of a project budget might normally be spent on MEL, but that this isn't a limit. BIG's international development plans have also included consultancy budgets for grantees, which many choose to spend on MEL. Peter also echoed Joanna's point on the importance of integrating design of MEL systems into the initial project design stage.

Discussion

The discussion began with a question about the value of longitudinal studies, that extend beyond the lifetime of a project, and whether donors would consider funding these. Sam agreed that organisations that invest in MEL beyond project funding get greater value from their MEL. Dylan Matthews (YCare) recommended a 'Do It Yourself' approach, sharing that YCare have conducted internal evaluations for as little as £3-5K to explore what happened in projects up to 10 years later. These have yielded an enormous amount of learning. Peter agreed, saying that donors 'just peek into your organisation' for a few years here and there – systems and processes need to outlive this.

The capacity and desire of local partners to own MEL was discussed in the context of the report recommending local analysis of MEL data. Joanna agreed that not all partners have this capacity, but highlighted that the capacity does need to exist locally, so organisations should think about what support is necessary to achieve this. A participant asked how partners could be encouraged to value MEL, beyond making it a condition of funding (the approach most often taken!) – and noted that this challenge is especially acute if you're working with activists. Others shared their experience that it's vital to incorporate MEL into projects rather than 'bolt it on' – what are the partners themselves interested in? This is the most important data if a MEL system is to work and to be owned by those that can use it.

The value attributed by donors to internal evaluations (conducted by NGOs not independent consultants) was questioned by one participant. Caroline shared that her experience prior to DFID had been in the NHS where she had advocated self-evaluation. If an internal evaluation is appropriate and can be justified, organisations should defend this position. Stephen Porter (DFID) emphasised that the strategic thinking behind MEL is vital. MEL needs to support strategic outcomes – and there needs to be a strong justification of the costs. In this context internal evaluation is fine, but NGOs need to demonstrate how their findings are triangulated with other evidence (preferably external).

Sam refuted the idea that 'internal evaluation is just as valid', explaining that NGOs' desire is often to show that what they're doing has impact, and the temptation is therefore to go out and gather information to prove that - hence people's inclination to disbelieve their findings. He warned that we need to be careful in identifying the driving forces for evaluations. Why are you making this investment? Stefano D'Errico (Comic Relief) agreed that there can often be a temptation to focus on success stories (sometimes driven by a demand from donors); there is a need to ensure that qualitative information is used for more than fundraising – it's rarely used systematically to enable learning from what hasn't worked as well as what has and to bring about change.

What next?

NGOs' points about MEL issues that remain a challenge were noted by funders. Through the cross-funders working group comprising staff from DfID, Comic Relief, Big Lottery Fund and Bond, we will continue to identify opportunities to fund and support better MEL, to contribute to better programmes and ultimately better development outcomes. The next research output will be a summary for commissioners and policymakers about the range of methodological approaches available to address impact evaluation questions in different contexts. Meanwhile we invite NGOs to share sharing good MEL practice via the Bond [MEL Working Group](#) and by using our [effectiveness](#) resources, with new MEL resources available from October.