

MEAL Model and Guide

Humanitarian Global Service Actors

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List of acronyms

ACAPS	Assessment Capacity Project
ALNAP	Active Learning Network for Accountability and Performance
AGI	Adolescent Girls Initiative
CDC	Centres for Disease Control and Prevention
CEO	Chief Executive Officer
ELQ	Evidence and Learning Question
EU	European Union
ELRHA	Enhancing Learning and Research for Humanitarian Assistance
DFID	Department for International Development
FCDO	Foreign, Commonwealth and Development Office
GISF	Global Interagency Security Forum
H2H	Humanitarian to Humanitarian
HGS	Humanitarian Global Services
HVP	Humanitarian Value Proposition
InfoRM	Index for Risk Management
INSO	International NGO Safety Organisation
ITAI	International Aid Transparency Initiative
INTRAC	International NGO Training and Research Centre
M&E	Monitoring and Evaluation
MAG	MEAL Advisory Group
MEAL	Monitoring, Evaluation, Accountability and Learning
NGO	Non-Governmental Organisation
OECD (DAC)	Organisation for Economic Co-operation and Development (Development Assistance Committee)
UK	United Kingdom
US	United States
USAID	US Agency for International Development
VfM	Value for Money

Overview

This report is submitted to the Foreign, Commonwealth and Development Office (FCDO) as a final report for the HGS MEAL Support project (Humanitarian Global Services, Monitoring, Evaluation and Learning Component 1), to bring together learning from the project. The final report is also intended for online publication by the H2H Network's MEAL advisory group and use by HGS actors more broadly. The report includes an introduction to the MEAL challenges faced by HGS actors, a MEAL Model developed as a reference or 'benchmark' for HGS MEAL activities, and a MEAL Guide that offers practical guidance on implementing the Model and related tools.

Introduction

Global Humanitarian Services

In the complex ecosystem of international humanitarian actors, 'global humanitarian services' (HGS) offer specialised technical services to other humanitarian actors with the intention of strengthening the quality and/or accountability of humanitarian action. HGS actors tend to work at a global level and the users of their services tend to be humanitarian response actors at country level. The term 'HGS actor' may be used interchangeably with similar terms, such as global services, humanitarian-to-humanitarian (H2H), quality and accountability initiatives, and humanitarian innovations.

While HGS actors may lack formal definition, they have shared characteristics. First, they offer specialised technical services to address specific problems in humanitarian action at the level of the international humanitarian system,¹ in thematic areas such as data and information management, community engagement and accountability, and quality and sector professionalisation. Second, they operate indirectly by providing technical services to other humanitarian actors, most often direct responders at country level. Third, they are often multi-stakeholder initiatives composed of diverse actors, mostly from civil society, working in a collaborative way to address specific problems.

Amid ongoing efforts to improve humanitarian action, HGS actors are seen as systemic 'enablers' of effectiveness and as potential 'drivers' of systemic change. Donors concerned with the effectiveness of the humanitarian system invest in diverse HGS actors and consider them important parts of a diversified humanitarian ecosystem alongside large multilateral actors. But the sustainability of HGS actors remains far from guaranteed in the context of reduced humanitarian budgets, the dominance of large operational actors, and the administrative challenges that some donors may face in funding such small actors.

MEAL difficulties

In humanitarian action, monitoring, evaluation, accountability, and learning (MEAL) is a catch-all term for activities that support the planning, implementation and review of any strategy, programme, or innovation. They are a key function of any management cycle. In the humanitarian sector, MEAL is a well-developed function which usually includes an intentional results framework and a system of activities to monitor and report on performance. It includes learning, which is often overlooked but essential for programme effectiveness and adaptation.

However, MEAL models available to HGS actors are often unsuitable because they are devised for humanitarian response activities. As a result, HGS actors spend much effort trying to use log frames and indicators not really suitable for their purposes. Interviews with HGS actors indicate their MEAL activities

¹ ALNAP's State of the Humanitarian System 2018-2021 (Inception Report), defines the international humanitarian system as 'the network of interconnected institutional and operational entities through which humanitarian action is undertaken when local and national resources are, on their own, insufficient to meet the needs of a population in crisis'. Since the humanitarian system is formed of elements that have agency and can respond and change based on their interactions with one another, it is understood as a 'complex adaptive system.'

tend to be aimed at donors and resource mobilisation, instead of supporting strategic management and holding themselves accountable to the humanitarian system. HGS actors are interested in a MEAL system that could serve these multiple purposes in an integrated and efficient way.

Without appropriate MEAL models, tools and resources, it is difficult for HGS actors to make a compelling case to funders, to demonstrate their humanitarian value, and to share their learning with the wider sector about what works and how, in their thematic area. As a result, the humanitarian system risks losing important learning in key thematic areas with the potential to enhance the effectiveness of humanitarian action.

In response to this problem, some HGS actors have developed promising MEAL approaches, tailored to their specific needs. They have sought to manage MEAL activities for multiple purposes, using diverse frameworks for different donors, working systematically and flexibly towards a common goal, producing regular information about activities and outputs, reporting on complex outcome pathways, generating reports and proposals, and doing this all with few or no dedicated resources or MEAL expertise.

The emerging MEAL solutions developed by HGS actors coincide with the development of new approaches to MEAL in the wider international development sector. These approaches tend to focus on planning in complex and unpredictable contexts, flexible frameworks, adaptive management, capturing outcomes and impact, generating evidence and learning, innovations, and collaborations.

In this context, it was recognised that HGS actors would benefit from MEAL approaches adapted to their specific requirements based on some promising practices they developed, technical inputs from MEAL advisers, and emerging MEAL practices from the sector.

A MEAL Model and Guide

The HGS MEAL Model and Guide presented in this report are intended to provide a shared 'reference point' and tailored guidance for HGS actors and their MEAL activities. It is expected they will use the MEAL Model as a reference or 'benchmark' for emerging good practices and the MEAL Guide and tools to implement and develop them. Accordingly, these should help HGS actors to demonstrate humanitarian value, foster learning about 'what works' in the system, and streamline donor requirements.

While the HGS MEAL Model and Guide may be useful for all HGS actors, these tools were developed with the H2H Network, a network of HGS actors, and its MEAL Advisory Group. The tools cover the main elements of a MEAL system and may be adapted to different levels of resource, capacity, and ambition.

The HGS MEAL Model and Guide describes good practices as of 2021 based on a limited sample of informants and sources. The six elements synthesise this material and are intended as a starting point for developing further tailored MEAL solutions and future iterations.

The HGS Model and Guide are developed by Itad consultants contracted through FCDO's HGS Programme. They are informed by focused work in this area, including an initial review of HGS actors' MEAL needs and emerging practices, learning from providing MEAL support to HGS Partners, joint learning sessions with the H2H Network's MEAL Advisory Group, and further sense-checking and validation with selected donors. Some key steps in this process included:

- **HGS Programme:** In 2018, the UK's Foreign, Commonwealth and Development Office (FCDO), then the Department for International Development (DFID), launched the HGS programme, investing £7 million in improving the quality, effectiveness, and efficiency of humanitarian responses through specialist humanitarian partners in line with Grand Bargain commitments. The European Interagency Security Forum (EISF, re-launched in 2020 as the Global Interagency Security Forum),² The International NGO Safety Organisation (INSO), The Assessment Capacity Project (ACAPS), The Index

² In April 2020, GISF evolved from the European to the Global Interagency Security Forum, reflecting a growing membership and the network's growing reach.

for Risk Management (InfoRM) and the Humanitarian-to-Humanitarian Network (H2H). HGS dedicated a budget of £300,000 for MEAL activities, including real-time support to the HGS Partners (Component 1) and an external performance evaluation of the programme as a whole (Component 2).

- **HGS MEAL support:** In early 2020, Itad began providing MEAL support to HGS Partners. At inception stage, the first step was to conduct a Rapid Review of HGS Partners' MEAL support needs, involving a document review, stakeholder consultations, and an assessment report for each Partner. The process helped to develop collaborative relationships with the HGS Partners, a shared understanding of their specific challenges and required solutions, a series of MEAL support actions agreed with each Partner, and a joint learning agenda for the Partners and other HGS actors to be hosted by the H2H Network's MEAL Advisory Group (MAG). In the absence of an appropriate model to guide the MEAL activities of HGS actors, we developed a provisional MEAL System Framework ('MEAL model') to transparently guide the support activities based on emerging findings from the Rapid Review.
- **HGS mid-term evaluation:** In May 2020, DAI conducted a mid-term review focused on the HGS programme as a whole and the HGS programme logframe. Among other recommendations to FCDO, it urged HGS Partners to 'learn from what works' by better understanding what type of services are utilised by whom, for what purpose and within what time frame as well as what change they effect. It also recommended developing light-touch capabilities to monitor progress and adapt in real time – programmatically and at corporate level, and more consistency in the quality and formatting of services and products delivered. For the MEAL support project, the HGS mid-term evaluation recommended being innovative, emphasising learning above accountability, supporting adaptive management, and thinking – system wide as well as at the crisis level.
- **MEAL support to Partners:** From June 2020 to June 2021, Itad provided tailored MEAL support to strengthen the MEAL systems of HGS Partners: H2H, ACAPS, GISF, INSO and InfoRM. Informed by the rapid review of their MEAL needs, the provisional MEAL Model defining good MEAL practices for HGS actors, and ongoing dialogues with each partner, this involved providing prioritised support focused on framework reinforcement, system streamlining, capturing outcomes, and strengthening evidence and learning. In most cases it involved developing guidance and tools or MEAL services to support the partners.
- **Joint learning:** During this time, Itad also facilitated joint learning for HGS actors through the H2H Network's MEAL Advisory Group, aimed at exploring common MEAL challenges and sharing practical solutions focused on tailoring MEAL systems, measuring outcomes and impacts, using adaptive management, and developing a shared MEAL model. This involved facilitating four sessions with MEAL leads from interested H2H Members, sharing problems and solutions, and capturing learning in a brief report.
- **Donor dialogue:** Alongside quarterly activity reporting, Itad held quarterly internal reflection sessions and prepared short 'think piece' reports for FCDO on MEAL learning for HGS actors. This led to a series of fruitful discussions with the HGS Programme managers who provided an informed donor perspective to the learning.
- **Model testing:** In June 2021, as a final deliverable, Itad prepared this report to share with FCDO and HGS actors through the H2H MEAL Advisory Group. This involved drafting and finalising the MEAL Model and Guide based on the Rapid Review conducted at Inception stage, a synthesis of MEAL learning, guidance and tools developed through the project, and consultation and validation discussions about the MEAL Model with the MAG, HGS Partners, and key donors.

1. MEAL Model

The HGS MEAL Model is a framework that presents the key elements of a MEAL system tailored for HGS actors. It is intended to serve as a reference point for their MEAL activities and donor requirements. A provisional MEAL Model was developed in June 2020 based on initial research and consultations, its elements were tested and developed with the H2H Network's MEAL Advisory Group (MAG) and partners in the FCDO HGS programme from June 2020 until June 2021, and sense-checked with several donors and a philanthropic organisation in June 2021. This initial iteration should be further developed in time, based on applied experience and learning.

Principles

The MEAL Model is developed according to these principles:

- **MEAL system:** The MEAL Model is the initial iteration of a MEAL system designed with and for HGS actors. It is adapted for HGS actors, who offer specialised technical services to other humanitarian actors with the intention of strengthening the quality and/or accountability of humanitarian action.
- **Multiple purposes:** The MEAL Model is designed to promote accountability and learning, meeting the diverse MEAL requirements of management, funders, and the humanitarian system in an integrated way.
- **Humanitarian value:** The MEAL Model is designed to help HGS actors deliver humanitarian value, working through a value chain of services and products delivered by HGS actors, accessed and used by other humanitarian actors, and contributions made to humanitarian action in saving lives, reducing suffering, and upholding human dignity in humanitarian crises.
- **Learning focus:** The MEAL Model emphasises learning. It focuses on generating evidence of humanitarian value, learning what works and how to inform management decisions, and sharing learning with relevant actors to strengthen effectiveness at the system level.
- **Accountability needs:** The MEAL Model promotes accountability. It helps with reporting to funders on activities and delivery of outputs, as well as continual learning and sharing evidence and learning with relevant stakeholders in the humanitarian system.
- **Donor incentives:** The MEAL Model invites donor collaboration. It is designed to meet the requirements of institutional humanitarian donors and private sector partners, recognising their decisive role in shaping MEAL incentives. It is aligned with the purpose of Grand Bargain workstream 9, to simplify and harmonise reporting requirements.
- **Shared reference:** The MEAL Model provides a shared reference point for both HGS actors and donors, with a view to serving their mutual requirements in a substantive and efficient way. It includes six complementary elements and levels describing 'good enough' and 'ambitious' for each.³

³ Since 2007, humanitarians have promoted the concept of 'good enough' MEAL, which means 'choosing a simple solution rather than an elaborate one' in an emergency response (The Good Enough Guide, Impact Measurement and Accountability in Emergencies, 2007). For HGS actors, MEAL activities must be feasible, proportionate, and adapted to their work. But some HGS actors are more ambitious about MEAL, seeing it as essential for their operating models and their ability to influence the system.

HGS MEAL Model

This table present the HGS MEAL Model 2021.

ELEMENTS	LEVELS
<p>1 Value proposition: Your organisation articulates a ‘value proposition’, describing the problem addressed, proposed solution, added value, and impact goal.</p>	<ul style="list-style-type: none"> ▪ Good enough: the proposition is described in organisational strategy, mission statement, documents etc. ▪ Ambitious: a humanitarian value proposition (HVP) is made explicit, including progress achieved and lessons learned.
<p>2 Logic model: Your organisation uses a ‘logic model’ to guide its approach, including services delivered, services used, and contributions made to the humanitarian action at programme, portfolio, response, or system level.</p>	<ul style="list-style-type: none"> ▪ Good enough: a simplified logical framework (‘log frame’) is updated annually or biennially. ▪ Ambitious: a Theory of Change is developed and translated into outcome hypotheses about ‘what works and how’.
<p>3 Data and information: Your organisation collects quantitative data and produces management information regularly about product/service delivery compared to strategy intentions.</p>	<ul style="list-style-type: none"> ▪ Good enough: information produced monthly on how many products and services delivered, accessed, and how. ▪ Ambitious: information produced in real time on how many products and services delivered, accessed, and how.
<p>4 Evidence and learning: Your organisation generates evidence and learning about users, and how they used your products and services to contribute to humanitarian action.</p>	<ul style="list-style-type: none"> ▪ Good enough: analyses to what extent products and services are used as intended (reports annually). ▪ Ambitious: learns about ‘what works and how’ for sharing with the sector (reports annually, biannually, or quarterly).
<p>5 Planned process: Your organisation implements a planned MEAL process to support strategy.</p>	<ul style="list-style-type: none"> ▪ Good enough: annual process focuses primarily on data and information, with limited investment in evidence and learning. ▪ Ambitious: multiyear process focuses primarily on evidence and learning, with knowledge products as outputs.
<p>6 Allocated resources: Your organisation allocates necessary resources to the MEAL plan.</p>	<ul style="list-style-type: none"> ▪ Good enough: MEAL coordinator is appointed, owns the plan, leads on a majority of tasks, and is funded through management costs. ▪ Ambitious: MEAL coordinator is appointed and owns the plan. Relevant managers lead on different tasks. Plan is funded through additional budget lines.

2. MEAL Guide

The H2H MEAL Guide provides practical guidance for implementing the HGS MEAL Model and is intended to help HGS actors strengthen their MEAL practices. The six elements and their corresponding guidance were developed in June 2021 based on an initial review of emerging MEAL practices for HGS actors and a review of guidance provided, and tools developed during the HGS MEAL support project. They are not exhaustive but intended to foster continued learning among HGS MEAL practitioners.

Element 1. Value Proposition

This element is aimed at articulating a value proposition which should help HGS actors to describe the value their organisation will deliver.

Key terms:

- **Value proposition:** A humanitarian value proposition is a statement about the value an organisation will deliver in terms of contributions made to saving lives, reducing suffering, and upholding human dignity in humanitarian crises.
- **Humanitarian innovation:** Humanitarian innovation is an 'iterative process that identifies, adjusts and diffuses ideas for improving humanitarian action. It means (i) Doing something different at a sector/system level; (ii) Seeking improvement for the sector/system; (iii) Iterative process. (Obrecht, A. and T. Warner, 2016).

Tools:

Tool A: Developing a humanitarian value proposition

What:

Articulate a 'value proposition' for your organisation, describing the problem addressed, proposed solution, added value, and impact goal.

- **Good enough:** describe the proposition in your organisational strategy, mission statement, documents etc.
- **Ambitious:** develop an explicit HVP, including progress achieved and lessons learned.

Why:

Articulating a value proposition may be helpful in the following ways:

- **Policy narrative:** It frames an organisation's purpose as a 'policy-level' narrative at the level of the humanitarian system, giving clear meaning to activities.
- **Clear purpose:** It provides the organisation with clarity of purpose required when serving multiple donors and stakeholders.
- **Collaboration:** It defines added value in relation to external context and other actors, facilitating engagement and collaboration, and reducing scope for duplication.

How:

Articulate your value proposition at the start of a multiyear strategy, and update to reflect significant progress or changes. Follow these steps:

- **Define a humanitarian problem:** Describe the specific problem your organisation seeks to address in terms of humanitarian action and its effectiveness in saving lives, reducing suffering, and upholding human dignity in crises. Provide a clear description of the problems observed and assumptions made, supported by evidence-based research where possible.
- **Identify existing solutions and gaps:** Outline current activities to address the problem carried out by other actors, including other HGS actors, humanitarian responses actors, and/or national and local actors where relevant. Specify the gaps in these existing solutions and the implications for humanitarian effectiveness.

- **Specify the goal:** Specify your organisation's overall objective and/or intended impact, aligning it with the problem and gaps already identified. Think in terms of comparative improvements, learning that can be shared and adopted more systemically. Make the goal realistic and achievable, recognising it is not within your power alone but relies on the actions of other actors. Avoid abstract visionary statements that can neither be achieved nor meaningfully measured.
- **Explain your methodology:** Outline the methodology you will use to achieve this goal, including which products and services will be delivered. Report progress achieved to date, if any, and learning that supports this approach. If there is a new product or way of working or an 'innovation', make this clear.
- **Deploy the proposition:** Once articulated, use the proposition consistently to frame your MEAL products, including progress reports, proposal writing, evaluations, and learning. Use it to meet the requirements of public donors and private funders, to replace 'needs assessments' and 'context analysis' sections in templates for direct humanitarian action. By sharing the proposition, you are more likely to engage others in effecting the changes intended.

You will need:

- **Good enough:** For a light-touch approach, dedicate approximately one to two days of strategy development time to engage managers in addressing these questions at the start of your strategy, making clear your organisation's thinking, assumptions made, and limitations.
- **Ambitious:** For a stronger approach, dedicate time (for example five to six days) to evidence-based research to address the questions, using secondary document review and primary stakeholder consultation where appropriate. For a still stronger approach, update the value proposition through quarterly evidence and learning activities (see Element 4).

Challenges

- **System change:** The humanitarian system is understood to be a particularly 'complex adaptive system' where change is non-linear and unpredictable. In this context, change activities are advised to take an iterative approach, involving action and re-planning to the changing situation (Knox Clark, 2017). The MEAL system itself can support this as the data collected and analysed (see [Element 3](#)) and reflected upon through the learning processes (see Element 4) all inform the understanding of the humanitarian context, which in turn leads to iterations of the value proposition.

Useful links

[ALNAP](#): a paper which provides a way of framing and conceptualising the evaluation of humanitarian innovation.

[IATI](#): Example of value proposition statement

[Kimball, L. \(2015\)](#). The Service Innovation Handbook: Action-Oriented Creative Thinking Tool Kit for Service Organisations. Oxford: BIS Publishers.

[NCOA](#): A how-to-guide and worksheet on developing your value proposition for evidence-based programmes.

[USAID](#): Example of a value proposition on what USAID and the private sector bring when they work together

Element 2. Logic model

This element provides guidance for developing a logic model that explains the chain of services that you will deliver to achieve your value proposition and guide your organisation's strategy.

Key terms:

- **Logic model:** A programme theory or logic model explains how the activities of an intervention are understood to contribute to a chain of results (short-term outputs, medium-term outcomes) that produce ultimate intended or actual impacts. It can be shown in the form inputs->processes->outputs ->outcomes -> impacts but sometimes other forms are more useful (Better Evaluation, no date) A log frame and a Theory of Change are types of logic model.
- **Causal chain:** A causal chain is an ordered sequence of events, illustrating how one activity in the chain causes the next. Sometimes described as theories of action that sit within theories of change, the aim is to illustrate the linkages between an organisation's work and the desired medium and long-term changes it seeks to influence (Intrac, 2017)

Tools:

Tool B: Example log frame

What:

A 'logic model' describes the causal chain of services delivered, services used, and contributions to humanitarian action at the programme, portfolio, response, or system level.

- **Good enough:** use a simplified logical framework ('log frame') updated annually or biennially.
- **Ambitious:** develop a Theory of Change, translated into evidence and learning questions about 'what works and how'.

Why:

Using a logic model may be helpful in the following ways:

- **Donor requirement:** It is a requirement of most public sector donors and private sector funders, and can be essential for resource mobilisation.
- **Inform design:** It clarifies the causal chains or 'pathways' for how HGS activities are intended to contribute to improved humanitarian action. This can guide your programme and MEAL plan.
- **Outcome focus:** It helps focus your MEAL activities on learning about outcomes in addition to accountability for outputs. This can add an important balance with production milestones and quantitative indicators that emphasise outputs and deliverables.
- **Coherent activities:** It reinforces coherence across different activity streams and projects funded by different donors, so that outcome pathways work harmoniously towards the same goal.

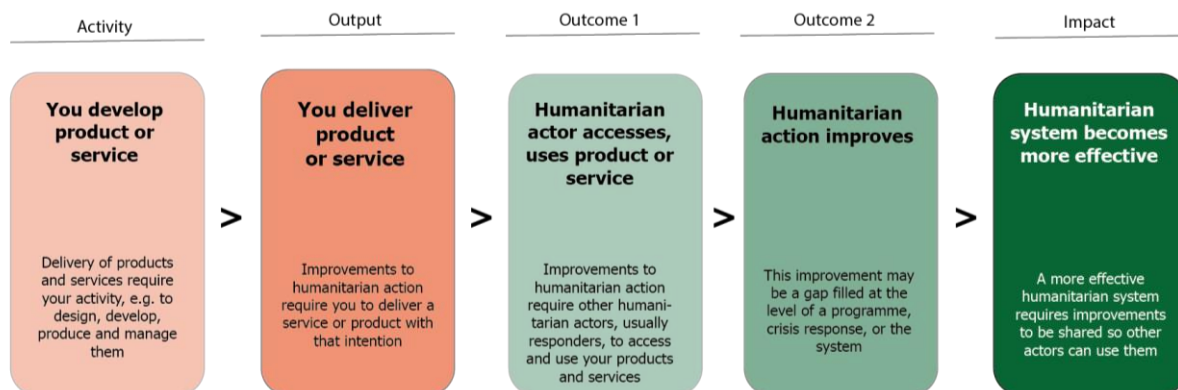
How:

Use a 'logic model' to guide your organisation's strategy, by revealing the logic in a simplified log frame, developing a theory of change to guide your strategy design, or developing evidence and learning questions to guide its implementation. Use the following steps:

- **Reveal the logic:** Reflect on your organisation's strategy and address the question: how exactly are the activities and products intended to contribute to the strategic goal? Start with your largest

activities that require most resources and consider the steps needed, including outputs, outcomes, and impact. Consider using paper and pencil to ‘map’ out this expected process. For HGS actors, the logic model may be composed of a few (1-3 ideally) causal chains (see [Figure 1](#) below).

Figure 1 An Indicative Causal Chain



- **Prepare a simple log frame:** Translate your causal chains into a simple log frame. Use a simplified version of a log frame that includes one to three main outputs, each with an intended short-term outcome, and expected improvements to specific humanitarian programmes, responses, or the system. If helpful, specify any key assumptions about the external context and any risks for each link in the chain (see [Tool B](#) and below for suggestions about what to include and exclude). Including a total of nine key indicators should be enough for an HGS actor which can be rolled up further into three evidence and learning questions (ELQs) (see [Element 4](#)).
- **Contractual obligations:** Keep in mind that you may be contractually accountable for outputs only, but going beyond these contractual obligations demonstrates good MEAL practice. A focus on learning about outcomes and knowing how best to generate them will help tell a better story about the changes your organisation has made (see more in [Element 3](#) and [Element 4](#)).

Table 1 Elements of a log frame

Elements to include	Elements to exclude	Elements to consider
Results chain/logic	Context analysis	Inputs
Principal objective/impact statement	Baselines	Activities
Specific objective	Stakeholders	Weighting
Outcomes	Targets	
Outputs	Milestones	
Assumptions/Risks		

- **Develop a theory of change:** You could consider going beyond a simplified logical framework to thinking through more carefully about how best to achieve your impact goal. Develop a theory of change that can inform your strategy design by bringing together selected stakeholders in a facilitated session. Generate a diagram and accompanying narrative about how change is expected to happen, based on available evidence and learning. Use this to guide strategy design.
- **Apply active learning questions:** Essential to logic models are the assumptions that underpin them – these may be contextual, programmatic or causal assumptions and refer to the conditions that you assume to be in place for your causal pathways to succeed. For example, a causal assumption assumes that an end user has the time to implement a new HGS system. You can turn these assumptions into

active learning questions that allow for dynamic evidence generation and learning about the key hypothesis embedded in your causal chains. These should focus on testing simple hypotheses [e.g. your product/service delivered + Intended user access/uses it = improve humanitarian action] to learn 'what works where and how'. Use these for an 'evidence and learning approach' or 'adaptive management'(see Element 4).

You will need

- **Good enough:** Preparing a simple log frame may require one or two workdays to prepare in a MS Word format. It will take a little longer to present, validate and revise before finalising the diagram and declaring its limitations.
- **Ambitious:** Developing a theory of change will require a facilitator's time to research and prepare the session, stakeholder participation for at least a half-day session, and then one to two days to develop the diagram and the narrative description. Preparing one to three evidence and learning questions can be done in a less than a day if the logic model is already explicit. Using them actively for 'adaptive management' may require additional effort (see Element 4), quarterly investments of MEAL time to generate evidence from management information and other current sources, bring management together for a facilitated learning, and preparation of a brief evidence and learning report (maximum four pages).

Challenges

- **Log frames:** While there are several recognised limitations of log frames, they remain the tool most widely used by institutional donors. You should be clear about which parts of the log frame your organisation considers applicable and which apply instead to 'direct' humanitarian and development projects. In general, your log frame will need to prioritise evidence and learning about its humanitarian value and outcomes instead of demonstrating effective delivery through quantitative output measurements.
- **Framework ownership:** Donors and their perceived requirements are often crucial in shaping how your organisation does MEAL. The log frames required by donors are usually adapted from those used with humanitarian programme delivery actors and, as a result, HGS actors either struggle or spend a lot of time trying to retrofit their own log frames to meet donor requirements. It is suggested that donors could help HGS actors by defining benchmarks for what MEAL is expected of HGS actors and establishing coherence in their MEAL requirements.

Useful links

Better Evaluation: A tool, developed by NGO-IDEAS, designed to help communities analyse the chain of effects from activities to outputs.

Better Evaluation: Blog based on a webinar that presented a set of tasks to help define exactly what is to be evaluated.

Better Evaluation: Resource that identifies the basic elements of a programme logic model.

Better Evaluation: Training guide on developing a logic model.

CDC: Guidance on developing evaluation indicators.

DEVEX: Resource on the different types and characteristic of a good indicator.

Elrha: Guidance on how to develop a theory of change.

EU: Methodological Guidance on results and indicators for development.

FCDO (formerly DFID): Methodology Guidance Document on Log frame Measurement.

Intrac: Resource on different types of programme indicators.

Intrac: Resource on overcoming the limitations of log frames.

UK Aid Direct: Information on developing a log frame.

USAID: Template for a logical framework.

Element 3. Data and information

This element is to help HGS actors collect data and produce management information, which will then feed into evidence generation and facilitate learning (Element 4).

Key terms:

- **Data:** ‘Raw, unorganised facts’ (Christoplos et al., 2017). Here data refers to the quantitative data collected about products delivered, products accessed etc.
- **Information:** ‘Data that has been processed to show patterns and give meaning’ (Christoplos et al., 2017). Here information refers to data analysed and/or aggregated to produce management information about the delivery of products.
- **Activities:** ‘Actions taken, or work performed through which inputs, such as funds, technical assistance and other types of resources are mobilised to produce specific outputs’ (OECD DAC, Glossary). Here activities refer to all work done by the HGS actor to prepare and deliver the outputs.
- **Inputs:** ‘The financial, human, and material resources used for the development intervention’ (OECD DAC, Glossary). Here inputs refer to resources, usually funding allocated, human resource time, and technical expertise invested in preparing and delivering the product or service.
- **Outputs:** ‘The products, capital goods and services which result from a development intervention; may also include changes resulting from the intervention which are relevant to the achievement of outcomes’ (OECD DAC, Glossary). For HGS actors, outputs mainly refer to products and services prepared and delivered.

What:

Collect quantitative data and produce management information regularly about product/service delivery, compared to strategy intentions.

- **Good enough:** information produced monthly on how many products and services delivered, accessed, and how.
- **Ambitious:** information produced in real time on how many products and services delivered, accessed, and how.

Why:

- **Management:** it is important for management to know whether products and services are being delivered on time, on budget, and to quality standards.
- **Accountability:** it is an accountability, and usually a contractual requirement, to deliver outputs as intended and to explain any variances.
- **Evidence and learning:** it is necessary to have information about products and services delivered to generate evidence about outcomes and contributions to higher goals.

How:

- **Decide data required:** Limit the scope of quantifiable data collected to what is required for accountability or useful for learning. For outputs, focus on how many products and services were delivered as intended, and the percentage that met your quality standard (if you have one). For short-term outcomes, measure how many intended users accessed the products and services, and by what medium or platform. In some cases, it may be relevant to collect data about intended users and their results.

- **Collect data consistently:** Collect data consistently about outputs delivered and products/services accessed through management systems, preparing as management information on a monthly basis. Aim to automate this process using business management software to produce management information in real time.
- **Prepare management information:** Remember data needs to be turned into information if it is to indicate performance. Establish systems to analyse data on product and service delivery and user access, then translate into information needed for reporting against indicators. Invest in automation and real time dashboards if possible.
- **Ensure proportionality:** Do not collect more data than needed. Bear in mind that time spent analysing production and access data usually means time not spent generating evidence and learning about what works in improving humanitarian action.

You will need

- **Good enough:** Collecting data, cleaning, and storing it manually in spreadsheets on a monthly basis takes sustained effort from a data analyst. This may add up to several days per month.
- **Ambitious:** Investing in business management and client management software may be a more economical alternative, generate information in real time, and allow opportunities for measuring cost-effectiveness and value for money.

Challenges

- **Proportionately:** Many HGS actors appear to collect data without a clearly defined scope. For many organisations doing too much can be as big a problem as not doing enough, especially if it absorbs limited resources, attention, and energy without generating useful evidence and learning.
- **Light touch:** Poorly defined MEAL scope that tries to capture all activities and outputs without a clear focus is a recipe for excessive data collection and 'information inflation'. This may be compounded by multiple indicators to be measured for different donors. A light touch approach is selective, propositional, and prioritised – instead of comprehensive.

Useful links

Better Evaluation: Resource on data management which outlines aspects of data quality and provides options for data management systems.

Intrac: Guidance on data use for learning, accountability and project or programme management.

Intrac: Resource on data and knowledge management, including guidance on how it should be stored and how to generate and share usable knowledge based on this data.

Riserbato, R. (2021): Blog of different types of client management software.

Tola Data: A dedicated monitoring and evaluation (M&E) software package that includes tools for data collection and management.

Element 4. Evidence and learning

This element helps HGS actors use the data from [Element 3](#) to provide the evidence and analysis needed to learn about what works well, not so well, and what adaptations may be needed to improve effectiveness.

Key Terms:

- **Evidence:** ‘Information that relates to a specific proposition, and which can be used to support or challenge that proposition’ (Christoplos et al., 2017). Here evidence means processed information that relates to the value proposition, logic model, and causal chains.
- **Learning:** Here learning means exploring what works and how to inform strategic and tactical decision-making, based on an intelligent and dynamic use of evidence, information and data. It implies a ‘learning mindset’, starting from an assumption of uncertainty about what will work and using a flexible approach involving testing, monitoring, getting feedback and making course-corrections if necessary.
- **Adaptive management:** Adaptive strategies are those which support an organisation to search out information, learn or analyse and make changes based on this learning in an appropriate time frame. The decision to use an adaptive strategy generally begins with the acknowledgement that it is not clear how best to achieve success in a given context. This contrasts with an ‘anticipatory approach’ where options are planned for and resourced in advance, so that when changes happen, the organisation can shift (Obrecht, A. 2019).
- **Outcomes:** ‘The likely or achieved short-term and medium-term effects of an intervention’s outputs’ (OECD-DAC, n.d.). Here short-term outcomes refer to products and services accessed and used by humanitarian actors, and medium-term outcomes refer to contributions made to effective humanitarian action. Short-term outcomes may include any ‘changes in the behaviour, relationships, activities, or actions of the people, groups, and organisations with whom a programme works directly. These outcomes can be logically linked to a program’s activities, although they are not necessarily directly caused by them.’ (Earl et al., 2001). These changes are aimed at contributing humanitarian value by providing partners with new tools, techniques, and resources to contribute to humanitarian action.
- **Impact:** Impact looks at the wider effects of the project – social, economic, technical, environmental – on individuals, gender- and age-groups, communities and institutions. Impacts can be intended and unintended, positive and negative, macro (sector) and micro (household) (ALNAP, 2006). Here, impact refers to increased effectiveness at the level of the humanitarian system.

Tools:

[Tool C: Case study guidance](#)

[Tool D: Evidence and learning tool](#)

What:

Generate evidence and learning about users and how they use your products and services to improve humanitarian action.

- **Good enough:** analyses to what extent products and services are used as intended (reports annually).
- **Ambitious:** learns about ‘what works and how’ for sharing with the sector (reports annually, biannually, or quarterly).

Why:

Generating evidence and learning about what works may be useful in the following ways:

- **Sense making:** It makes sense of diverse data (quantitative and qualitative data), to assess progress and understand what works and how.
- **Informing progress:** It informs strategy design and implementation (through ‘adaptive management’), building on what works and learning from what does not, to increase progress towards impact goal.
- **Systemic improvements:** It enables improvements to the humanitarian system if brought to appropriate scale or shared with other relevant actors in the humanitarian system.

How:

- **Identify evidence needs:** Element 2 will use your logic model to identify the key causal pathways, outputs, outcomes, and assumptions that are essential for your logical model to work in practice which will inform the data collection plan. If you have translated your logic model into one or more clear evidence and learning questions, use them as your starting point. Use your data collection plan to understand where the evidence will come from to inform analysis and learning.
- **Processes:** Understand what data will be generated and when and what that means for analysis and learning. For example, not all data may be generated at the same time so consider this in your processing and planning (see Element 5 below).
- **Focus on utilisation:** Generate evidence about intended users and how they use your products and services to improve humanitarian action. Select a sample of intended users, and consult them through key informant interviews, focus group discussions, surveys, or case studies. This could be conducted either quarterly or biannually.
- **Consider contributions:** Draw on the MEAL systems of intended users, where possible, to generate evidence about contributions made to their achievements. With few MEAL resources, limit your investment in assessing how users deliver humanitarian value – by relying on evidence and learning products generated by their MEAL systems. Use key informant interviews with a few relevant managers to collect perceptions and reveal ‘tacit knowledge’ about what worked and how.
- **Use case studies.** Case studies can be useful to analyse data across several contexts or stakeholders and can provide a more detailed focus on outcomes (see resources below). Use multiple sources – documents, interviews, and observations – to provide evidence for outcomes and why and how change occurred. Consider doing two to three case studies (or joint learning activities where this is more economical) each year and use those to identify patterns, strengths and weaknesses in your evidence. See Tool D for a light touch case study approach.
- **Collate evidence:** Collate relevant information collected during Element 3 to better understand how your products and services have influenced intended users, contributing to improving humanitarian action. Where possible triangulate evidence to strengthen findings and recognise limitations where evidence is weak. Prepare emerging findings from your evidence to inform learning events (see below).
- **Facilitate learning:** Present emerging findings and evidence to strategic managers, asking them to reflect on what worked and how. Ask them to consider why some products and services were successful and identify the key factors at play to learn lessons. Agree lessons learned, implications for strategy, and recommended actions. Write up these findings and lessons in a short report (maximum four pages).
- **Sharing learning:** Synthesise learning to share with other stakeholders to contribute to systemic improvements. Publish online or go further to proactively disseminate through webinars, short reports, informal discussions, participation in relevant discussions.

You will need

- **Good enough:** Consultation process of users (purposive surveys, key informant interviews, or case studies). Learning events (biannually or annually) to reflect on progress and direction for improvements.
- **Ambitious:** consultation of users (purposive surveys, key informant interviews, case studies); evidence generation/synthesis; learning events. Quarterly management meetings for evidence generation and synthesis on learning.

Challenges

- **User satisfaction:** Some HGS actors and donors assess user satisfaction, through surveys of users. However, while satisfaction may be important in all service provision, it is not alone a sufficient measure of humanitarian value.
- **Utility focus:** While HGS actors tend to invest much effort in describing and measuring their activities through quantitative data and indicators, too little effort goes into understanding users and utilisation, or contributions made to humanitarian action.
- **Learning:** Producing management information, consulting users and other MEAL activities are of limited value unless they generate evidence and learning to support continual improvement (and adaptive management) and learning that can support improvements to the humanitarian system. MEAL systems focused on accountability, donor relations and proving delivery as intended cannot do this.

Useful links

Action Learning: Abbott et al. (2019) outlines a range of learning approaches for humanitarian actors, including better use of tacit learning and more formal ongoing learning activities.

Alternative approaches to monitoring and evaluation: Dillon, N. (2019) explores a range of MEAL innovations that can support learning, decision-making, and adaptive management approaches.

BOND: describes adaptive management and its application in programmes, organisations, funding and partnerships.

Intrac: Introduces adaptive management for CSOs, including requirements and MEAL implications. The author, Nigel Simister, discusses constant learning, tactical and strategic adaption in a [blog](#).

Intrac: Guidance on developing case studies and stories of change.

PACT: provides a practical guide to the mindsets, behaviours, resources, and processes needed for an effective adaptive management system. See related [Panel discussion](#) and [blog post](#).

Taylor-Powell, E., & Renner, M. (2003): Describes a simple approach to analysing and interpreting qualitative data.

USAID: Practical information on using case studies, including guidelines for identifying when a case study has been conducted well and used effectively.

USAID: presents its [Collaboration, Learning and Adapting Framework](#) to support programmes along with a [CLA toolkit](#). Also the [CLA Maturity Tool](#) with further explanation in an [overview](#).

Element 5. Planned process

This section sets the importance of a planned process to maximise the value of MEAL systems and make them as effective and efficient as possible.

Key terms:

- **Knowledge products:** Documents and publications derived from evidence and lessons learned. These can cover a wide range of purposes and for HGS actors should be used to disseminate evidence and learning within the organisation but also to intended users, donors, and the wider sector. They should be light touch and could take the form of a blog or a think piece based on learning generated through a MEAL system.

Tools:

[Tool E: Suggested MEAL plan](#)

What:

Implement a planned MEAL process to support strategy.

- **Good enough:** annual process focuses primarily on data and information, particularly on evidence and learning.
- **Ambitious:** multiyear process focuses primarily on evidence and learning, with knowledge products as outputs.

Why:

Implementing a planned MEAL process may be useful in the following ways:

- **Strategy support:** A MEAL system is essential for guiding strategy delivery and a MEAL plan is essential for delivering the MEAL system with a process for accountability and learning.
- **Process:** it ensures MEAL activities are a predictable and systematic part of strategic management. This is more effective than ad-hoc approaches often used by default.
- **Light touch:** It enables MEAL activities to be efficient, proportionate, and coordinated. HGS organisations rarely conduct their diverse MEAL activities in a systematic way, and it is important to prevent these activities becoming too resource-intensive or derailed from their initial purpose.

How:

- **Develop MEAL Plan:** Develop a MEAL plan that specifies how, when and by whom any MEAL activities will be delivered, e.g. data collection, learning events and reporting. Clearly show time frames, person responsible, and level of effort. Consider a simple one-to-two-page MEAL plan aligned to your strategy and other annual planning processes. The plan should be implemented by all relevant staff within your organisation, coordinated by the MEAL focal point, and overseen by your chief executive officer (CEO).
- **Streamline MEAL activities:** Ensure a 'light touch' approach to MEAL by using selected focus, few indicators, purposive sampling, and declared limitations. Define your scope of enquiry through a limited number of meaningful indicators (maximum nine), derived from your value proposition, programme theory and strategy. A limited scope should ensure your MEAL activities are proportionate to the scale of a programme and no more than necessary for the purpose.
- **Allocate resources:** Allocate human and time resources to the plan. Outline the specific roles and responsibilities for each MEAL activity (see [Element 6](#)).

You will need

- **Good enough:** Dedicate approximately one to two days to develop your MEAL plan, including a mapping of current MEAL activities, prioritisation for the next 12 months and ensuring alignment to your strategy and data management systems. Extra days will be needed for the MEAL focal point to coordinate the plan.
- **Ambitious:** Preparing a multiyear MEAL plan will require dedicated time (for example four days) to consultant with the senior management team to ensure alignment to your strategy and evidence and learning processes. Additionally, you may want to include one to two days to develop guidance on producing knowledge products.

Challenges

- **Scope:** The main risk with MEAL plans is that they may become too detailed, complex and ambitious – stay focused on developing a simple, costed, one-two-page plan that is in line with other annual planning processes.

Useful links

Bond: Practical support to help NGOs prove and improve their MEL and effectiveness.

Compass: Guidance on how to develop a Monitoring and Evaluation Plan.

EvalPartners: See page 86 for characteristics of a good knowledge product.

Evaluation Toolbox: How-to-guide for developing a monitoring and evaluation plan.

Intrac: Guidance on developing project monitoring and evaluation (M&E) systems.

Intrac: M&E of Development Approaches, for civil society organisations (CSOs), advocacy and capacity development.

Save the Children: Introductory course in Monitoring, Evaluation, Accountability and Learning (MEAL).

Tools4Dev: Step-by-step guide on how to create a monitoring and evaluation (M&E) system.

Element 6. Allocated Resources

This element is to help HGS actors allocate necessary resources to MEAL.

Key terms:

- **Value for money:** The optimum combination of whole-life cost and quality (or fitness for purpose) to meet the user's requirement. It can be assessed using the criteria of economy, efficiency and effectiveness (Jackson, 2012).

What:

Allocate necessary resources to the MEAL plan.

- **Good enough:** MEAL coordinator is appointed, owns the plan, leads on a majority of tasks, and is funded through management costs.
- **Ambitious:** MEAL coordinator is appointed and owns the plan. Relevant managers lead on different tasks. Plan is funded through additional budget lines.

Why:

Allocating resources to the plan may be useful in the following ways:

- **Dedicated resources:** It can provide some resources to MEAL in the absence of dedicated funding for management and MEAL activities. Few organisations have dedicated MEAL resources, and any resources available need to be carefully managed, since funding for MEAL is very limited.
- **Value for money:** It can make savings by improving value for money (VfM). As reflection and learning are essential, they need dedicated time and resources to improve effectiveness and efficiency to improve VfM. In turn, a stronger value proposition, based on evidence and learning, could be made leading to potentially more funding.
- **Coordination:** It can provide enough resources for a MEAL coordinator to own the Plan and ensure its implementation.
- **Capacity gaps:** It can make best use of analytical capacities in the organisation in the absence of specialist MEAL staff.

How:

- **Designate MEAL coordinator:** Appoint a coordinator to manage the MEAL plan, making them responsible for preparing the plan and coordinating its implementation. The MEAL coordinator role does not need to be a full-time job but rather a function. They should 'own' the MEAL plan, but they do not need to be a MEAL expert to manage it. Rather, appoint someone with coordination skills, who can check the activities are carried out and provide any support or guidance where needed—based on the plan. Where possible and appropriate, the coordinator may also take a lead on evidence and learning activities, such as facilitating quarterly evidence and learning sessions, capturing evidence and learning from these sessions, storing evidence and learning, and preparing knowledge products.
- **Maximise existing resources:** Consider what resources you have/need to implement an appropriate MEAL plan. Your MEAL plan needs to be adequately resourced in terms of finance, personnel and time. It should be able to be covered largely by existing management and staff capacities. Through a formalised MEAL plan, your organisation should be able to implement MEAL activities in a coherent manner and within established resource parameters.
- **Use external resources:** Look for existing external resources to help develop your MEAL plan and implement activities. This guide contains lots of links to external resources to help but you might wish

to seek out others according to your organisations' MEAL requirements. Additionally, your MEAL coordinator may draw on external service providers to provide technical support.

- **Mobilise resources:** Aim to dedicate a separate budget line to MEAL with an investment of approximately 5%-10% of your overall budget to MEAL activities, if possible, within your organisation. Through a planned process you could show the value add of MEAL activities which could help to mobilise resources. A suggestion to donors is that they should consider dedicating 5%-10% of project funding to evidence and learning outputs about what works to share with other actors and feed their own evidence and learning requirements.

You will need

- **Good enough:** For a 'light touch' approach, dedicate resources to appoint a MEAL coordinator (approximately one to two days per month for coordination efforts); aim to reorientate existing management costs to allocate 5%-10% of your overall budget to MEAL.
- **Ambitious:** Investment of 5%-10% of organisational effort and a separate budget line dedicated for MEAL activities. Staff time to implement activities according to the MEAL plan.

Challenges

- **Buy-in:** MEAL activities are often considered resource intensive and often get deprioritised among other demands. Additionally, if one person is specifically charged with MEAL, others might not consider it their responsibility. However, a planned process for MEAL should encourage buy-in and ownership from all relevant staff members.
- **Donor willingness:** Donors are reportedly unwilling to directly fund MEAL positions or activities. Within already limited resources, HGS actors struggle to dedicate resources (time, people, budget) to MEAL activities.

Useful links

AGI: A resource guide on building a monitoring team, including an overview of roles, tasks and sample terms of references.

CARE: Example of defined roles and responsibilities of monitoring and evaluation.

Intrac: Guidance on M&E functions and how they relate to each other.

Intrac: Resource on how to create a supportive environment for M&E.

Intrac: Resources for M&E, an analysis of resources needed, including finance, personnel and time.

Itad: Investing in Monitoring, Evaluation and Learning: Issues for NGOs to consider.

Tools

A. Developing a humanitarian value proposition

As suggested in the Guide, articulating a humanitarian value proposition (HVP) as an essential step in establishing integrated systems that meet your MEAL requirements. This guidance and tool will help to develop an HVP statement, which may be adjusted annually or with a new strategy. It should be completed by the CEO based on the MEAL framework/system. It is also good practice to state limitations, and your evidence vs hypotheses.

The table below provides questions on each part of the HVP to help frame the development of the statement.

Element	Guiding questions	Guidance
Problem statement (context)	<ul style="list-style-type: none"> What humanitarian problem does your initiative seek to address? At which level/in which way does this affect populations affected by humanitarian crises? 	<ul style="list-style-type: none"> Be as specific as possible, consider 'risks'/OECD evaluation criteria Refer to credible objective sources if possible Make assumptions explicit otherwise
Activities	<ul style="list-style-type: none"> What main activities are conducted (i.e. products prepared, or services delivered etc)? What proportion of effort on each? 	N/A
Impact + how (mechanism)	<ul style="list-style-type: none"> What is your initiative's intended impact, and at what level? What main approach/es do you use to achieve this? List outcome pathways and include level of effort (as a percentage) in each. What evidence of progress/outcomes generated to date? 	<ul style="list-style-type: none"> Consider: Level: Outcome pathways: Mechanism/Assumptions: Evidence: Hypothesis:
Users	<ul style="list-style-type: none"> Who are your main intended users? How are they expected to use your products and services? 	<ul style="list-style-type: none"> Intended users State 'Open source' if you have not defined specific intended users
Alignment to humanitarian principles, and policies	<ul style="list-style-type: none"> How does your initiative uphold humanitarian principles? Which ones? How does your initiative contribute to global policy objectives? Which ones? 	N/A
Added value	<ul style="list-style-type: none"> What are the most important humanitarian activities aimed at addressing the problems above? How does your initiative build upon/add value to/cohere with these other humanitarian activities? What specific gap does it seek to fill? 	<ul style="list-style-type: none"> List other 'activities', three is enough Refer to those conducted by major humanitarian actors Consider national and local actors where appropriate
Counterfactual (challenging)	<ul style="list-style-type: none"> What would be the situation/consequences if your initiative did not exist/stopped functioning? 	

<p>Mission completion (challenging)</p>	<ul style="list-style-type: none"> ▪ Under what circumstances will you consider your mission accomplished? 	
<p>HVP statement</p>	<ul style="list-style-type: none"> ▪ [initiative name] addresses the problem of [name problem] by producing [x products] and delivering [y services] so that [z users] are better able to [...], resulting in [...]. Without [initiative name], humanitarian action [at x level] would [state risk] 	

B. Example log frame

The below log frame is an example of a tailored log frame which can be adapted for your organisation based on your logical framework.

Statement	Indicator/Variable	Methods for evidence and learning	Assumptions and risks
Impact <ul style="list-style-type: none"> [Organisation] will collect learning by thematic area and make it available (on an ongoing basis and/or annually) to the humanitarian system, so that responders can apply learning elsewhere 	Possible indicators <ul style="list-style-type: none"> Explicit mentions of organisational learning in system and thematic reviews Explicit reference to thematic improvements Evidence of contributions found in evaluation/stakeholder perceptions 	<ul style="list-style-type: none"> System wide and thematic reviews and evaluations, e.g. State of the World Humanitarian System Internal evaluations Biannual evidence and learning sessions Annual report 	
Outcome 1 <ul style="list-style-type: none"> Humanitarian responders access and use services as intended, contributing to improved responses (in thematic areas and overall) 	Possible indicators <ul style="list-style-type: none"> Evidence that responders accessed products and services Evidence that responders accessed products and services (e.g. explicit references) Evidence that utilisation of products and services reinforced or improved the response 	<ul style="list-style-type: none"> Periodic reporting Case studies User consultations 	
Outputs <ul style="list-style-type: none"> [Service/Product] is delivered in a purposive, timely and flexible manner 	Possible indicators <ul style="list-style-type: none"> Service/Product clearly defines thematic gap # of days to deliver Service/Product Level of flexibility perceived by users 	<ul style="list-style-type: none"> Management information and data User feedback 	<ul style="list-style-type: none"> Service/Product increases contribution to effectiveness of response.
Inputs <ul style="list-style-type: none"> Donors provide financial resources 	Possible indicators <ul style="list-style-type: none"> Amount of funding from each donor 	<ul style="list-style-type: none"> Account data 	<ul style="list-style-type: none"> Funding to improve the system increases effectiveness (and efficiency/VfM?) of humanitarian action, alongside funding to humanitarian action, in a context of insufficient/shrinking resources.

C. Case study guidance

This document provides a step-by-step guide for you to develop case studies which should be adapted for your organisation. Suggested level of effort for each step is found the in brackets.

Step 1. Preparation (1-2 days)

The purpose of this step is to design the case study as well as possible before beginning data collection.

Background and context

- Collect descriptive information about the background to the subject of the case study and the wider humanitarian context at the time.

Purpose and scope

- Define the purpose of the case study in relation to your MEAL requirements.
- Define the scope of enquiry in terms of thematic, geographic and temporal scope.

Framework and ELQs

- Develop hypothesis/ELQ to guide case study enquiry.
- Explain your selection: what reason for selecting this case study, what is its relationship with the wider system, and what implications there are for findings.

Step 2. Data collection (2-3 days)

The purpose of this step is to collect data using a mixed methods approach of document review, key informant interviews, and observations (where possible).

Document review

- Identify 5-7 documents, preferably prioritised. These may include finalised periodic reports, other internal documentation, grey literature/emails, management information, social media posts.
- Extract evidence and information from these sources into an evidence matrix.

Key informant interviews

- Identify 3-5 key sources for interviews, preferably sequenced. Use a semi-structured approach which includes only a few questions to better understand use and contribution to the response.
- Snowballing to request further interviews with users of your service/products.
- Conduct the interviews explaining terms – i.e. Using a journalistic approach and ask whether their comments are citable or not.

Observations and multimedia sources

- Request photos, diagrams or clips to 'observe' and/or include in the case study, other sources such as social media posts etc.

Step 3. Analysis and reporting (2 days)

The purpose of this step is to review data collected, generate evidence, and draft the first version of the case study. It is also an opportunity to validate the case study will all relevant stakeholders.

Analysis

- Conduct iterative analysis of information collected, using/working in an evidence matrix to map the main findings.

Report drafting

- Prepare a first draft, using journalistic 'feature writing' style.
- Share first draft with other team members for comments and amend report accordingly.
- Share draft with relevant informants for approval and/or comments.

Step 4. Finalisation and Publication

The purpose of this final step is to copy edit the report and publish it through communication channels.

Finalisation

- Prepare final draft for publication, including all comments.

Publication

- Format for publication.
- Publish case study i.e. on your organisation's website and disseminate through your networks.

D. Evidence and learning tool

The below tool is can be used to support your planned quarterly evidence and learning meetings involving senior management teams. This draft is illustrative and should be adapted according to an organisations' evidence and learning questions. The evidence section should be completed before the session using information from management data, user consultations and the tacit knowledge of staff membebrs. The learning section can then be completed during the meeting. You should aim to assess strength of evidence and your level of confidence in it.

ELQ1. To what extent has [service] strengthened best practice in [sector]?	
Evidence: What are specific cases of progress under this quarter?	Source
<ul style="list-style-type: none"> ▪ [Compile evidence from different sources to demonstrate progress] 	<ul style="list-style-type: none"> ▪ [List source here]
<ul style="list-style-type: none"> ▪ 	<ul style="list-style-type: none"> ▪
<ul style="list-style-type: none"> ▪ 	<ul style="list-style-type: none"> ▪
Learning: What works where, how, for whom and to what extent? What quality and limitations of evidence generated? What implications (if any) for (a) hypothesis 1, (b) strategic prioritisation, and/or (c) course correction?	
<ul style="list-style-type: none"> ▪ [Add key learning points from evidence and learning session discussion] 	

ELQ2. To what extent has [product] contributed to better-informed decisions in crisis?	
Evidence: What are specific cases of progress under this quarter?	Source
<ul style="list-style-type: none"> ▪ [Compile evidence from different sources to demonstrate progress] 	<ul style="list-style-type: none"> ▪ [List source here]
<ul style="list-style-type: none"> ▪ 	<ul style="list-style-type: none"> ▪
<ul style="list-style-type: none"> ▪ 	<ul style="list-style-type: none"> ▪
Learning: What works where, how, for whom and to what extent? What quality and limitations of evidence generated? What implications (if any) for (a) hypothesis 1, (b) strategic prioritisation, and/or (c) course correction?	
<ul style="list-style-type: none"> ▪ [Add key learning points from evidence and learning session discussion] 	

E. Suggested MEAL plan

As highlighted under Element 5, HGS actors should establish a formalised MEAL plan which will help them to implement MEAL activities in a coherent manner and within established resource parameters. The table below can be used as a guide for establishing a MEAL plan. It maps out the suggested MEAL activities, sources of information, when they should conduct them, and provides an indicative level of effort.

Activity	Source	Time frame	Level of effort
Product/publication information	<ul style="list-style-type: none"> Data analytics Management information 	Monthly	1 day
Service delivery information	<ul style="list-style-type: none"> Management information Feedback forms 	Monthly	1 day
User/access data	<ul style="list-style-type: none"> Data analytics 	Monthly	1 day
Users' consultation by key informant interviews/Focus Group Discussion	<ul style="list-style-type: none"> Focus group discussions Feedback from members, Board 	Quarterly	2 days
Evidence and learning sessions	<ul style="list-style-type: none"> Strategic management group 	Quarterly	1 day (including preparation ahead of sessions)
Progress reports	<ul style="list-style-type: none"> Management information User consultations Evidence and learning sessions 	Quarterly	2 days
Case studies	<ul style="list-style-type: none"> Simple case studies with users and responders Relevant external case studies 	Quarterly/Annually	6 days for 'light touch' approach
User consultation by survey	<ul style="list-style-type: none"> Survey with users, members, stakeholders 	Annually	3 days
External document review	<ul style="list-style-type: none"> Internal annual review Directly relevant external review 	Annually	2 days
Advocacy/ Stakeholder communications	<ul style="list-style-type: none"> Blogs, speeches, presentations based on evidence generated 	Periodic	3 days
Donor proposals	<ul style="list-style-type: none"> Internal or joint project design based on evidence generated 	Periodic	10 days
Donor reporting	<ul style="list-style-type: none"> Internal or joint project reporting based on evidence generated 	Periodic	5 days
Annual report	<ul style="list-style-type: none"> Internal reporting and analysis based on evidence generated 	Annual	3 days
Evaluation	<ul style="list-style-type: none"> External assessment based on evidence generated, other sources 	3 yearly	10 days

Annexes

I. List of stakeholders consulted

The table below presents a list of stakeholders consulted during the drafting of the HGS MEAL Model and Guide.

Name	Organisation
Annemieke de Jong	Ikea Foundation
Chloe Laborde	iMMAP
Dana de Guzman	Humanitarian Open Street Map Team
Gabrielle Kaprielian Cunin	Fondation Hironnelle
Fergus Thomas	Foreign, Commonwealth and Development Office
Heather Hughes	GISF
Helen Kearney	H2H
Katherine Parra	USAID - Bureau for Humanitarian Assistance
Langdon Greenhalgh	USAID - Bureau for Humanitarian Assistance
Larrissa Penny	Foreign, Commonwealth and Development Office
Lars Peter Nissen	ACAPS
Lauren Burrows	Humanitarian Open Street Map Team
Leith Baker	USAID - Bureau for Humanitarian Assistance
Philippe Besson	Swiss Agency for Development and Cooperation
Regina Gujan	Swiss Agency for Development and Cooperation
Tina Gear	International Health Partners
Vanessa Malila	Humanitarian Academy for Development

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