

Roadmap for Piloting MEL Tools and Approaches for P2P Learning

Sep 2021

1. Purpose and principles for engagement

The purpose of this note is to set out a roadmap for piloting a MEL approach for P2P learning. The aim is to put into practice the ideas explored in the EIP Lessons Harvesting Report (Aug. 2020) and the subsequent EIP Learning Notes (2021). Further, it will seek to document some practical examples and challenges so that the EIP Secretariat, jointly with interested members, can co-create MEL tools and frameworks for P2P engagements as a common resource for members.

Co-creation of a P2P MEL framework builds on the following principles:

- **The process should be bottom up and exploratory:** The piloting will avoid prescribing methods, solutions or specific MEL approaches. Rather, tools should be tailored to and informed by the relevant context, including the organizational context and existing MEL practices of involved actors.
- **Tools should be practical, implementable and user-oriented:** Capturing qualitative outcome-level use of learning insights and how they inform organizational practices can be difficult and labour or cost-intensive. The purpose of the exercise is to find ways to make it easier, and to lower the barriers to meaningful P2P MEL practices.
- **There is no 'one size fits all' – a range of tools and considerations will be explored.** Rather than seeking to find one optimal way of doing MEL across all P2P learning settings, the purpose is to explore a range of possible approaches and tools depending on the problem at hand, the nature of the P2P engagement, the actors involved (including their individual capacities, incentives and operating contexts).

2. Engaging MEL pilot partners for co-creation (Sep - Dec. 2021)

The EIP Secretariat will lead a scoping for P2P actors willing to engage and put time towards the piloting process. It is suggested that this process is open to EIP members and/or non-members and that the announcement is sent out both via email and posted on the EIP website. Preparatory inputs will be supported by the MEL consultant.

Advisory Group members can also be asked to play a more proactive role in the scoping process, drawing on their own experiences and networks. It would be advisable to engage P2P initiatives that already are funded or that have an existing budget allocation for MEL and/or where this can be added by the donor to allow for staff time to engage in the piloting process.

The aim would be to get 2-3 (minimum 1) groups to start the co-learning and production of MEL tools. Ideally, selected cases would represent:

- 1) Different types of P2P arrangements as per the initial typology included in the Lessons Harvesting report: peer-based knowledge platform, problem-driven peer groups, or carefully matched institutions engaged in a twinning model¹ of peer exchange.
- 2) Different types of actors/sectors such as: public sector actors where the P2P component is part of a larger public sector reform initiative, and initiatives where peer learning is facilitated across different types of institutions (e.g. citizen representative associations or CSOs and public institutions involved in local governance) etc.
- 3) Scope and time for involving national/local actors in the localization of tools and approaches used, and to secure their ownership in the process (i.e. beyond the central facilitating organization as applicable).
- 4) A degree of mutuality (or willingness to formulate mutual learning goals) and mutual accountability between actors involved in the P2P engagement.

Ideally, selected P2P engagements would be in their early stages of formation in order to introduce and co-design MEL approaches from the outset. However, it is also possible to engage with an established P2P initiative that has been going on for some time, given that there is a need and desire among those involved to introduce adapted MEL practices to get to outcome-level insights about the P2P initiative's effectiveness in relation to institutional strengthening.

3. Problem identification and self-assessment (Dec. 2021 – end March. 2022)¹

A first analysis of the problem would seek to identify the need of actors for more nuanced MEL tools. The purpose would be to fully understand and match MEL approaches with the problem, learning objectives and different learning needs by different partners. This initial assessment will look at and/or come up with what (substantive) change the P2P learning engagement will contribute to as well as who will play what role along the way for the P2P learning to add most value.

Key questions for analysing existing change models, or come up with a new one, would be:

- a) What (internal or external) capabilities are being enhanced/unleashed or otherwise targeted through the P2P engagement?
- b) How do these capabilities fit into overall 'system dynamics' (institutional and inter-organizational) necessary for the desired change(s)?
- c) Why is P2P learning seen as a way (potentially alongside other capacity-development efforts) to achieve these capabilities? How does the P2P modality complement other means of organizational learning?
- d) How are different learning efforts paced, involving whom, and who will track their effects?
- e) How do we regularly test if the right actors (inside and outside the targeted peer institution) is being involved and motivated to learn from the P2P engagement?

¹ Timing will be dependent on whether we can work with one or up to three different P2P engagements, and will have to be adjusted to their timelines and programmatic commitments. The suggested timing here is therefore only indicative and will have to be negotiated with involved partners.

Also, unless already done, this phase could also involve a participatory self-assessment among participating institutions. Already existing analysis and building on existing tools will be important. Inspiration can also be drawn from GPI's existing partnerships capacity assessment tools to draw up partner profiles (in a baseline to be updated regularly).

Tools to be used and adjusted to fit the partnership:

- a) Problem-identification and analysis, drawing on existing problem diagnostics and the institutional system(s) in which it is embedded. Tools would draw on approaches tools explained in **Problem-Driven Iterative Analysis (PDIA)** approach, using e.g. Ishikawa (fishbone) diagrams to try to understand the underlying (root) causes to the problem. Aspects of the problem that are predominantly technical in nature will be separated out from those that are systemic (with more variables involved/dependent on more actors and interests aligning). This will then be analyzed from the viewpoint of what and where the P2P engagement could add value. Knowledge and experience of EIP members who have used PDIA more actively could be leveraged in the process (e.g. CABRI).
- b) A **capabilities self-assessment** can be conducted with participating peers. These will be synthesized into peer partner profiles to understand how different partners assess different aspects of the problem in relation to their own organizational capacity. One aspect will be their perceived capability in relation to MEL in order to better understand what role each partner has the capacity and/or skill to take on, or what additional support may be needed. Inspiration and tailoring of the capacity self-assessment tool used by GPI can guide this process, combined with the institutional core capabilities framework laid out in the EIP Lessons Harvesting report. Learning exchanges with GPI (or GPI partners) would also add value to this process.

4. Tools development (March-end May 2022)

The selection and tailoring of MEL tools will be done jointly with piloting partners, following their unique needs, and the nature of the problem (explored in the previous phase). It is expected that the MEL consultant will actively support this process to reduce the workload of partners as/if needed. The EIP Secretariat will also stay closely involved to gather lessons throughout the process.

The selection and tailoring of tools will take into consideration (as per the self-assessment referred to above):

- **The different functions and intended use of MEL** in the partnership and for individual organizations, e.g. how does it need to balance the different functions of MEL (such as accountability, communications, tracking of progress, internal and external communications etc.). What type of evidence would be most valuable to take P2P insights to scale and expand the authorizing environment/get senior management onboard?
- **The different capacities for undertaking MEL** by the involved actors (including time and organizational incentives), including capacity of partners to be involved in data gathering/provision of feedback so that the MEL function does not only reside only with one coordinating actor.

- **The intended use of MEL products**, e.g. to enhance the monitoring of results/outcomes, gain credibility for the change process, to create political will and buy-in, and/or to sustain motivation and momentum in the partnership etc.

Tools to be used and adjusted to fit the partnership:

- Tools will draw on **actors-based and behavioural change-based MEL approaches**, including (combinations of) Outcome Mapping, Outcome Harvesting and Most Significant Change approaches. However, the aim is to combine this with existing tools and reporting requirements of the piloting organization so that it adds nuance and meaning to the reporting – particularly when it comes to tracking institutional capability strengthening and uptake of learning insights.
- The aim is that testimonials and evidence that is systematically gathered will be used and **incorporated into the P2P learning process** so that ongoing exchange will build on insights and experiences along the way.
- Tools will try to capture change at **three different levels**: a) at the individual level among peers, b) at the institutional level inside each partnering institutions, and c) at a more systemic level, e.g. in relation to contextual root causes of the problem, or to influence the way issues are framed and addressed in the sector where they operate.
- Of particular interest will be to find tools where **partners can feed in real-time**, and pass on to a synthesizing/coordinating organization of the MEL function (most likely residing in the facilitator/intermediary in the P2P partnership). A simple form, like the Results Evidence Sheet used by GPI (explained in the Lessons Harvesting report) can provide guidance.
- Digital options for distributing data gathering inputs and facilitating joint interpretation and analysis can also be explored during this phase (e.g. KoBo Toolbox² and similar), or for facilitating analysis of qualitative data and collected change stories (e.g. Dedoose³).⁴

5. Piloting and adjusting tools (June-end September 2022)

This phase would involve more active data gathering and rolling out of the drafted instruments and tools. It is expected that this part would be led and coordinated by the coordinating P2P piloting institution (likely the facilitator/intermediary of the partnership), who would also be in charge of involving participating peers, in order to ensure ownership and localization as needed. However, the “lead” P2P institution would be actively supported by EIP/MEL consultant as needed.

The EIP (and MEL consultant) would likely play a less active role at the outset of data gathering, but more in relation to gathering lessons on what worked well and how tools could be adjusted and refined once data gathering had started. The data gathering cycle would end with support to synthesizing information and gathering lessons around the use of tools (what worked well, what adjustments are needed for the next data gathering cycle).

² [KoBoToolbox | Data Collection Tools for Challenging Environments](#)

³ <https://www.dedoose.com/>

⁴ A more extensive list of digital tools for M&E (regularly updated) is available here: [M&E Software: A List – Monitoring and Evaluation NEWS \(mande.co.uk\)](#)

The aim would be to engage in the first data gathering exercise (the roll-out of tools) for each participating/piloting P2P partnership, and to have one coordinating counterpart for each P2P initiative to regularly liaise with. Tools and data gathered are strictly the ownership of that coordinating organization and participating peers (not EIP or the consultant).

Tools to be used and adjusted to fit the partnership:

- This phase would be less focused on tools development, but will seek to provide support on how to **interpret and visualize** gathered data, particularly from the viewpoint of tracking how it feeds into both collective problem-solving and institutional strengthening.
- It can also include support for how to “package” P2P MEL insights to fulfill the different functions and MEL needs laid out in the initial phase with a focus on how it can be used to further inform the course of the P2P partnership itself.
- Based on an assessment on what type of evaluative evidence is being gathered, and what the strength of initially gathered data appears to be, this phase can also help P2P partners draw up an evaluation plan on where/what aspects **need to be further unpacked**, and thus benefit from external validation through evaluation. Having a full MEL framework in place means balancing the different functions of “M”, “E” and “L” and to make sure that both monitoring and evaluation is driven primarily to fill knowledge gaps (not just for donor accountability).

6. Feedback and documentation of lessons (Oct-Dec 2022)

After a first completed cycle of data gathering, the MEL consultant would synthesise the experiences of the pilot process including key lessons for a broader EIP audience. This means writing up key takeaways from the process of piloting for a broader EIP audience, using specific examples (with piloting partners’ review and approval), but not revealing the content insights which is in the ownership of piloting peers and the coordinating P2P facilitator. This distinction will allow for the piloting peers to present their own cases, while some more generic process from across cases can feed into e.g.:

- A synthesis of what worked and what was challenging in coming up with and implementing P2P-tailored MEL tools (in different types of P2P constellations), including different process insights and adaptations along the way,
- A series of practical ‘how to’ notes and tips from participating members on how to go about it,
- A series of MEL implantation protocols (or guidance notes) for P2P learning.

This could be complemented with more participatory feedback sessions, webinars and discussions (online) to stimulate information sharing across the EIP/P2P community of practice.