A TOOLKIT FOR
PARTICIPATORY EVALUATION OF PRACTICE

Family
for every child

Contents

Background and purpose of this toolkit

Family for Every Child is a growing international network of local civil society organisations (CSOs) working on the ground to support children, families and communities. Local CSOs lead the alliance on its journey to strengthen support for rights holders to be their own agents of change. Diverse perspectives, local expertise and contexts, and unique identities are highly valued by the alliance, as are models of practice which foster participation and inclusivity.

Practice exchange is at the heart of Family for Every Child's model and theory of change, highlighting the extensive knowledge and experience local CSOs and non-governmental organisations (NGOs) have accumulated over years of working with children and communities to develop solutions to improve children's care. For practice exchange to be impactful for both CSOs and the children and families they support, it should be rooted in evaluated practice. Through evaluation, we can build on the body of effective and transformative practice within the children's rights sector.

The purpose of this toolkit is to provide guidance and resources for local CSOs, within and beyond the Family for Every Child alliance, as you evaluate your practice and programmes. The toolkit seeks to support an alternative approach to traditional evaluation dynamics, promoting non-hierarchical processes, drawing on the strength of local solutions, and focusing upon the outcomes and impact of those solutions on communities. Whether you are conducting evaluations independently or in collaboration with your CSO peers, practitioners will find in this toolkit clear guidance around evaluation goals and processes as well as accessible participatory tools for prioritisation, planning and data collection, which you can use to build a clear picture of impact.

A globally diverse reference group of 21 CSOs informed the development of the toolkit, and 5 of them conducted a pilot of its use. Through this highly participatory process, a toolkit has been created which will contribute to the goal of empowering local CSOs to both strengthen your practice and build evidence of this strength, better enabling you to advocate for positive change for children and families.

Acknowledgements

Glossary

This glossary includes terms specifically relevant to participatory monitoring, evaluation, and learning (PMEL).

Activities
The direct actions taken by your project or the work performed by the project team to unpack an output into the set of tasks required to complete it. Activities mobilise inputs to produce outputs. There can be more than one activity per output, and you can break these down further into sub-activities, depending on the scope and scale of the project, and the budget allocated to each output. Note: sub-activities should appear only in the work plan but not in the log frame matrix.

Assumptions
Hypotheses of external risks or factors that could affect the progress or success of your intervention and that are outside the mandate or control of those responsible within the project, programme or organisation. These should be carefully considered and recorded.

Backstop
Also referred to as 'backend support' or 'technical backstopping'. This refers to filling gaps or providing additional project reinforcement to other organisations.

CINDI
Children in Distress (CINDI) is a multi-sectoral network of 200+ civil society organisations capable of implementing diverse, effective and sustainable programmes for children and youth infected or affected by HIV and AIDS in the KwaZulu-Natal province of South Africa.

Civil Society Organisations (CSOs)
Non-state, not-for-profit, voluntary entities that are independent from governments and the economic market. CSOs do not include businesses or for-profit organisations. They consist of community-based organisations (CBOs) and non-governmental organisations (NGOs).

CSID
Centre for Services and Information on Disability (CSID) is a Bangladesh-based organisation which focuses on three core areas: information and resource sharing and networking; research; and community-based support services.

Data	The facts, statistics and other raw material gathered and analysed to inform and support your decision-making.
Data sources	The individuals, organisations or documents from which you obtain information to document and verify indicators. Data sources can be primary or secondary. Primary data is project-specific and collected directly at the source (e.g., attendance sheets), while secondary data is collected and recorded by another person or organisation (e.g., national statistics).
Digital literacy/fluency	This term reflects the more familiar term referring to reading and writing. However, it also acknowledges that while you need a baseline of knowledge, skills, and attitudes to be productive and participate in digital spaces ('digital literacy'), there is a spectrum of digital competency. Individuals can become more fluent in digital technology as they increasingly understand how to leverage technologies for specific purposes and why a technology will lead to the outcome they desire.
Do no harm	An ethical approach that attempts to prevent unintended and negative impacts of medical, humanitarian and development interventions. This statement aims to protect targeted communities and to ensure that only action that will be beneficial to stakeholders will be taken.
Ethics	In M&E, 'ethics' means ensuring that any of your engagement with people, especially children and vulnerable adults, must adhere to the ethical principles of respect, benefit and justice, paying close attention to harms and benefits, informed consent, privacy, confidentiality and payment.
Evaluation	The systematic and objective assessment of your project or programme. It generally occurs at one point in time, such as midway through or at the end of a project, and asks the question, 'Is our project making a difference?'
Goal	The broadest overarching and long-term aim of your programme.
HIV	Human immunodeficiency virus.
Hybrid community engagement	A combination of offline and online components to enable participation by and interaction with communities, partners and stakeholders.
Impact	Sustained or long-lasting changes that have occurred beyond the lifetime of a programme, both positive and negative.

Indicator	Also known as a 'performance indicator'. A measure of a particular characteristic or dimension of project results (outputs and outcomes) based on a project results framework and underlying theories of change.
Information and communication technologies (ICTs)	Information and communication technologies are the infrastructure, tools and resources used to transmit, store, create, and share information. These include computers, the internet (i.e., websites, blogs and emails), broadcasting technologies (radio, television, webcast platforms, podcast equipment/platforms, audio and video players) and telephones (i.e., landlines, mobiles, satellites, and videoconferencing).
Input	Resources, including human, material, financial and intellectual resources, put into a programme to enable activities to be implemented.
IRB	Institutional Review Board
JUCONI México	A foundation that works to prevent and heal the wounds caused by family violence that affects children, young people and their families, who live in conditions of social marginalisation and extreme poverty.
KIIs	Key informant interviews
Level of effort (LOE)	A calculation of the percentage of staff time spent on supportive and operational activities necessary to support a project's primary tasks. LOE = Staff member time in hours spent on supportive or operational programme-specific activities ÷ Total staff member work hours for the same time period x 100
M&E	Monitoring and evaluation
M&E Plan	A guide to why, how and when you will undertake M&E activities, including ethical considerations, sampling, data collection and analysis, management and use of results.
MERL (Monitoring, evaluation, research and learning)	Captures that monitoring and evaluation should always go hand in hand with learning, which is the process of acquiring new or modifying existing knowledge, behaviours, skills, values or preferences.
MICS	UNICEF's Multiple Indicator Cluster Survey

Mixed methods	A set of methodologies that collect both qualitative and quantitative data.
Monitoring	The ongoing, routine assessment of your project or programme. To keep track of progress, information is collected on a regular basis throughout the lifetime of a project.
NAP Global Network	The National Adaptation Plan Global Network
NGO Paicabí	The NGO Paicabí is a non-profit corporation founded in 1996 that works in the promotion and defence of children's rights in Chile.
Non-governmental organisation (NGO)	A non-profit organisation formed independently of government that generally works to advance social or humanitarian causes. Includes organisations, clubs and associations that provide services to their members and stakeholders.
Objective	The aim of a group of activities which contributes towards achieving the goal of your programme.
OECD DAC	The Organisation for Economic Co-operation and Development's Development Assistance Committee
Outcome	Also referred to as 'results'. An outcome is a change in the state, condition, or well-being of targeted communities, derived from an initiative's outputs or lower-level outcomes, that can be described and/or measured. Outcomes are not entirely within the project itself but are within the project's area of influence.

- **Ultimate outcome/impact:** The highest-level change to which your organisation, policy, programme, or project contributes through the achievement of one or more intermediate outcomes. The ultimate outcome usually represents the reason for your programme/project's existence and marks a sustainable change in the longer term.
- **Intermediate outcome:** A change expected to logically occur once one or more immediate outcomes have been achieved. Intermediate outcomes represent changes that occur in the medium term (five to ten years), usually achieved by the end of a project/programme to positively affect the welfare of the targeted population or environment (direct benefits) or the enabling environment (policies and institutions).
- **Immediate outcome/research outcome:** A change expected to occur once one or more outputs have been completed and delivered. Research outcomes represent

uptake and further use of research outputs by the next users targeted by the intervention, such as researchers, and national policy makers. Development outcomes represent capacity and behavioural changes concerning end-users. They could include, for example, the adoption of new technologies by farmers, or changes in competencies, knowledge, awareness, skills, or abilities among intermediaries and/or targeted communities, such as farmers' ability to assess post-harvest losses. They are generated as a result of research, capacity building, and advocacy activities. In terms of time frame, these are short-term outcomes.

Outputs

The direct products, tools, knowledge, data, services, technologies, and/or practices resulting from the activities undertaken by your project/programme/intervention within a specific allocated budget.

Participatory approaches

Methods for planning, collecting and analysing data, and presenting and using results that allow families, children, youth, and targeted communities to be fully involved, for their voices to be heard, and for them to be able to influence decision-making at the local, national, and global level.

Participatory monitoring, evaluation and learning (PMEL)

Highlights the engagement of different stakeholders within M&E processes. This includes but is not limited to the involvement of practitioners, CSO staff, targeted individuals, groups or communities. Generally involving the collection and analysis of data to recommend corrective measures, this data may support improvements to the practice of peer practitioners and CSOs, a specific programme, and/or others, such as donors and other CSOs involved in similar areas. Results from PMEL processes may be used within and among NGOs, CSOs, and other practitioners, in a way that empowers them to learn from their own experience and practice.

Peer-to-peer learning

An educational practice through which one or more individuals, such as co-workers from an organisation or field, teach and learn from each other. It lessens power dynamics that come from organisational hierarchy (i.e., bosses, leaders) and places individuals on a more equal footing as they share lessons they have learned and seek ways to improve their own practice.

Pilot

A trial run of your data collection tool with a sub-group of your sample to inform revisions that can lead to improvements.

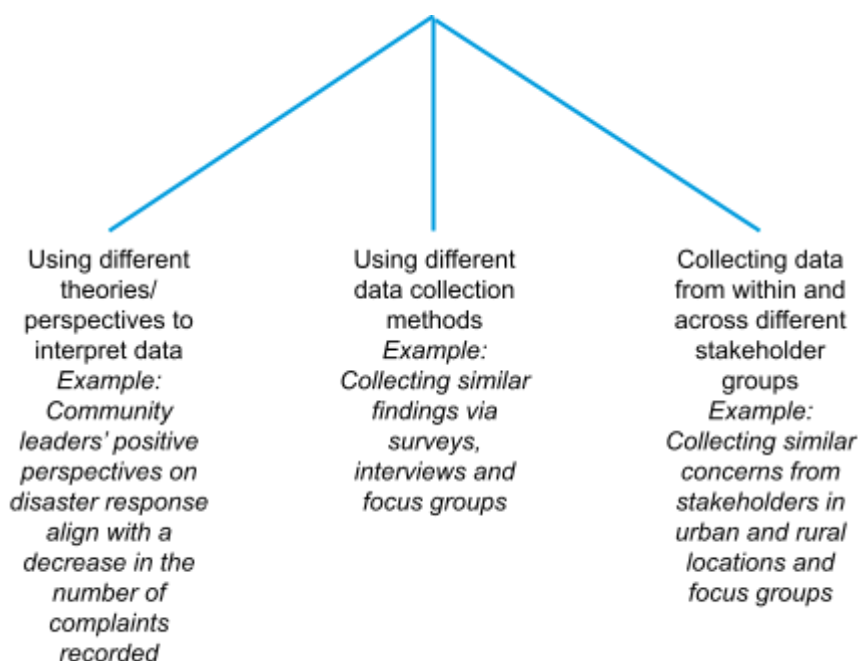|	
Practice exchange (PE)	The activity through which knowledge of practices (namely, information, skills, or expertise) is exchanged among people, friends, peers, families, communities (for example, Wikipedia), or within or between organisations.
Primary data	First-hand data gathered by researchers. You should include interviews, surveys, fieldwork, journals, personal letters, correspondence, emails, blogs, photographs, social media, drawings, posters, works of art, memoirs and literature.
PSEA policy	Prevention of sexual exploitation and abuse (PSEA) policy.
Qualitative methods	An approach to collecting data that is primarily descriptive, such as stories, narratives of activities and targeted communities' experiences. These methods seek to capture and distil themes from subjective measures, perspectives and opinions.
Quantitative methods	An approach to collecting data that can be counted or expressed numerically. These are generally objective measures that can be measured in numbers and statistics.
RACI	Responsible, accountable, consulted, informed matrix
Sampling	The process by which a smaller number of targeted communities are selected from the total possible number, so that data collection is more feasible but still yields results representative of the total population. Various sampling approaches are available.
Secondary data	Information collected by another person, such as previous research studies, censuses, organisational records, etc.
Self-assessment	The introspective evaluation of oneself or one's actions and perspectives, either at work or in one's personal life.
SIDA	Swedish International Development Agency
Situational analysis	An evaluation which you undertake to understand the key issues, actors and context, usually to inform your implementation plans.
SMS	Short messaging services
SWOT analysis	Strengths, Weaknesses, Opportunities, and Threats analysis

Targets	These specify a particular snapshot you would like to see by a specific set time after a development intervention or research activity begins. A target is related to a performance indicator and should be based on baseline data to ensure it reflects a good measure of achievement, is realistic, and is achievable. Depending on the timing specified, you may have end of project targets and/or annual targets.
Theoretical saturation	The point in analysis where collecting and analysing additional data does not teach you more about your topic.
TOC	Theory of change
TOT	Training of trainers
Triangulation	Cross-checking information gathered by using different methods and sources. For example, a visualisation of data triangulation is as follows:

Using different
theories/
perspectives to
interpret data
*Example:
Community
leaders' positive
perspectives on
disaster response
align with a
decrease in the
number of
complaints
recorded*

Using different
data collection
methods
*Example:
Collecting similar
findings via
surveys,
interviews and
focus groups*

Collecting data
from within and
across different
stakeholder
groups
*Example:
Collecting similar
concerns from
stakeholders in
urban and rural
locations and
focus groups*

UNDP	United Nations Development Programme
UNICEF	United Nations International Children's Emergency Fund in full, now officially United Nations Children's Fund
USAID	U.S. Agency for International Development
WHO	World Health Organization

How to use this toolkit

This toolkit comprises both comprehensive guidance on participatory monitoring, evaluation and learning (PMEL) and 22 PMEL tools. The guidance provides valuable context and information, but for time-poor practitioners, it is possible to go straight to the tools (pages 36-76) which are themselves accompanied by templates and instructions.

Building from the approach used to pilot this toolkit with Family for Every Child members globally and subsequent feedback, suggestions for using this toolkit are as follows:

1) Identify the project phase in which you would like to integrate a tool into your organisation's workflow. Consider:

   a. The challenges you currently face at this stage.

   b. Whether this tool will be entirely new to your organisation or an effort to improve or innovate within your practice.

   c. Who might be possible peers to connect with in this phase.

   d. Consider the purpose of PMEL as your organisation sees it, and how it uses findings from PMEL in its decision-making, and consider donor or funder requirements for reporting.

2) Consider your engagement with children, youth, families or other stakeholders as you incorporate this tool. What is the nature of this engagement? How might this tool strengthen the quality of the engagement? There can be a risk that children's and young people's involvement is tokenistic and to 'tick a box'. This approach is not only unethical, but also means that insights from key stakeholders are missed.

3) Consider how you can maximise this tool for your organisational purposes. This includes sharing feedback from those using it, identifying who will be responsible for compiling this feedback, capturing any adaptations made, and understanding how obstacles to its use were overcome within your project work.

4) Consider opportunities for exchanging learning with other CSOs, researchers, and organisations.

What is PMEL?

Participatory monitoring, evaluation and learning (PMEL) encompasses planning, collecting and analysing data, presenting and using results within and among NGOs, CSOs, and other practitioners, in a way that empowers them to evaluate their own practices. This includes monitoring, evaluation and learning that values and prioritises the involvement of those across targeted communities, including children, parents, guardians, community members and other stakeholders, to influence decision-making. Rather than assuming the model of employing external consultants, it highlights the expertise already available with CSO staff who know their programmes, communities, and contexts better than anyone, while also improving their motivation, increasing learning and leadership opportunities, and enhancing a sense of ownership that enables community empowerment. At the same time, staff continue to gain skills and manage their resources, while improving their ability to lead, adapt, and problem solve.

Greater motivation, learning, and ownership.
Improved leadership, adaptability, and problem-solving.

Participatory MEL

Prioritises reduction of power dynamics by seeking and actively engaging stakeholders, regardless of position, age, or experience, to drive the process

Aims for depth of information

During the data collection phase, stakeholders and rights holders are typically involved in decisions regarding methods for data collection and in the design of data collection instruments; they may even be involved in collecting the data

Senior managers, outside experts, and/or donor agencies typically drive the process as they are responsible for planning, project management, decision-making, and so on

Aims for breadth of information

Often relies on predetermined, quantitative indicators to drive data collection

During the data collection phase, stakeholders typically only provide information, rather than being involved in the data collection process itself

Conventional MEL

Resources

Estrella, M. (2000) Learning from change. In Estrella, M. (ed.) *Learning from change: Issues and experiences in participatory monitoring and evaluation*. London and Ottawa: Intermediate Technology Publications and the International Development Research Centre.
https://gsdrc.org/document-library/learning-from-change-issues-and-experiences-in-participatory-monitoring-and-evaluation/

Lasker, R.D. and Weiss, E.S. (2003) Broadening participation in community problem solving: A multidisciplinary model to support collaborative practice and research. *J Urban Health*, 80 (1), p. 14–47. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3456118/

Getting started

As a first step in the PMEL process, it is important for CSOs to clarify what PMEL means for their organisation; a strategic document can be produced for this purpose. It is crucial that staff at all levels are involved in drafting this document with an opportunity for feedback from the wider organisation. It should be reviewed and updated periodically.

With these organisational considerations in mind, planning to undertake PMEL of a particular programme or project can begin.

There are numerous practical considerations when selecting data collection methods. In general, methods should:

● Produce data that can be used and analysed to inform learning and decision-making.

● Be participatory.

● Be simple.

● Be accessible.

● Suit the nature of the activities, the scale of work and the purpose of the M&E, whether this is external accountability, internal learning, or both.

● Be achievable with the resources available.

There are numerous ethical considerations as well:

● Do no harm.

● Protect children.

● Ensure privacy and confidentiality.

● Consider health, safety and security.

● Ensure the welfare of staff.

Questions to shape your start with PMEL are provided in the sections that follow.

Key questions to reflect on

- What is the purpose of PMEL in your organisation's own words? Understandably, donor and funder requirements often shape projects and the PMEL that follows. However, it is important for your organisation to articulate why it values PMEL so that this purpose can be reflected in reports and learning to come.

- Who are the peer organisations working alongside you, in partnership with you, in similar areas to you, or doing research relevant to your project? How could you engage with these peers as part of PMEL? What has been successful previously? What challenges have hindered peer-to-peer learning?

- Who in your organisation is directly involved with PMEL and what is the nature of their involvement? A **RACI (responsible, accountable, consulted, informed) matrix** can support you in answering this question. It is important that the PMEL activities listed include opportunities for learning within your organisation and with your peers as well as activities related to decision-making.

RACI template

PMEL activity	Who is responsible for completing this activity?	Who is accountable, meaning they must give approval to those responsible?	Who needs to be consulted to offer input and feedback before those responsible begin to work?	Who needs to be Informed and given updates on progress and decision-making?

Key practical questions

Target community considerations

- Whose needs will the PMEL seek to address?

- Will findings and recommendations from the PMEL be used to extend an existing programme/system or will it help to create change?

- Are there opportunities for involvement in PMEL to promote capacity building, sustainability of impacts, and independent management of project activities/resources?

- What are the general immediate targets, short-term goals and objectives, and long-term goals of the programme being evaluated? What are the differences being made? Who is, or should be, involved in PMEL?

- What does quality participation in PMEL by these target communities look like?

Support considerations

Potential support roles include consultants, advisors, facilitators, instructors, enumerators and/or other partners in the PMEL. Key considerations include:

- Are there any individuals with the potential to provide PMEL support within the communities impacted by the project being evaluated? How much understanding and respect do they have for communities and/or contexts? Are they treated as valued partners and equals?

- How committed are they to working toward transformational change?

- Do they have the necessary knowledge and skills (e.g., M&E, group dynamics and community organisation) and/or are they willing to learn? What time and/or money investment will be required to build capacity?

- What community sensitisation, capacity building, training of trainers (TOT), or other trainings will be needed?

- What are their values and how do they complement and/or mirror those of your organisation?

- Are they well trained to facilitate communications with diverse stakeholders including children and individuals with disabilities?

Considerations on numbers

- How many participants do you aim to reach via your PMEL tools?

- How many communities will it take to reach your ideal participant number?

- Have you weighed this estimate against staff capacity and the need to increase the efficiency/outcomes of your projects?

Questions on location

- Where will the PMEL take place? Consider regions and local communities.

- Will the PMEL be conducted in-person, remotely or using a hybrid approach?

- What is the justification for where this PMEL will take place?

- Will meeting locations be near to or far from where your organisation is based? What transportation is available for staff and participants and what will need to be provided?

- What accommodation is needed and/or available?

- Where will individual and group data collection take place? Is this place accessible? Familiar meeting places should be identified: for example, community gathering areas, home visits, health centres, schools.

- What are the security and safety implications for potential locations?

- What are the safeguarding implications for potential locations?

- What are the ethical implications for potential locations, including considerations around privacy and confidentiality?

- If data collection is to take place remotely, what are the considerations with regards to data bundles, device access and bandwidth?

- If data collection is to take place remotely, what are the security, safety, safeguarding and ethical implications for such methods?

Questions on timing

- How long will your PMEL last? Will it be focused and in a short timeframe? Or will it be longer and spread over several months?

- At what point is PMEL being conducted in the project timeline? For monitoring, is it monthly or quarterly? For evaluation, is it at baseline, mid-line, or end-line?

- Do you have deadlines from the donor/funder that need to be considered?

- What time of the year is best for meetings and interviews? Consider rainy seasons, farming seasons, holidays, elections, etc., noting that this may affect participation.

- How mobile are the participants who will be involved? For example, if you are working with children on the move, will you be able to continue contacting them and for how long? Just once, or multiple times over several years? For example, with children and youth in pastoral communities, how long will they remain in a location?

- If you are working with people with disabilities, does data collection need to be broken up over several short sessions to maximise participation by these individuals? Do you have the relevant skills to communicate effectively with these individuals?

Budget and funding considerations

- How much funding is available for PMEL and over what timeframe? For example, are there one-time payments? Payments over PMEL phases? Is a percentage of the budget available to initiate PMEL?

- Where is the funding coming from? For example, local NGOs, local governments, international governments, donor organisations.

- What are the interests of possible funding groups?

- Do donor project standards align with the needs of the community?

- Is it possible to meet donor M&E standards with the skills and capacity of your staff?

- Do your staff have the skills and capacity to meet grant management/reporting standards?

- How can costs be kept low? What are the minimum and maximum anticipated costs?

- What is the level of effort your staff can invest in the project?

Looking ahead

- What opportunities will there be for learning among staff and with other CSOs working in similar areas?

- What opportunities will there be for self-assessment by staff members?

- How will you use the learning from PMEL? How will it be shared?

- What opportunities are there for continued learning and work with targeted communities during and/or after the PMEL has concluded?

- What ongoing financial, training, technical backstopping and/or programmatic support will be available once PMEL concludes?

- Have follow-up and support activities been considered and discussed with stakeholders throughout the lifetime of the project, to encourage active interest and engagement among communities?

Key ethical questions across PMEL phases[1]

Strong PMEL allows each individual involved to feel they are in a safe space and with a sense of trust to speak honestly and openly, either individually or in groups.

Designing PMEL: Focus

- Does the PMEL address relevant questions which have not been sufficiently monitored or evaluated before?

- Is the PMEL designed to contribute knowledge and understanding that could improve lives? Have targeted communities' views and priorities been taken into consideration in determining this, regardless of age, gender, ethnicity, disability, religion etc.?

- Do you have sufficient resources and capacities to ensure that PMEL findings can be shared and used?

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[1] Adapted from Family for Every Child's Ethics Checklist (March 2020).

Designing PMEL: Methods and tools

- Is the method relevant to the focus and PMEL questions? Will the method help you to find out what you want to know? Do targeted communities agree?

- Is ethical clearance required and if so, has it been sought?

- Is the method appropriate to the participant group (e.g., their age, attention span and level of understanding, culture, disability, literacy levels etc.)?

Designing PMEL: Sampling and participant recruitment

- Are there sufficient numbers of participants for the PMEL findings to be useful and credible?

- Have the participants been carefully selected to ensure they are representative of the group being studied?

- Will you work with participants you have an ongoing relationship with (for established rapport, understanding of their situation and follow-up support)? If not, is there a trusted partner you can work with that does have this relationship?

- Are all groups who might have information relevant to the PMEL included or is there any discrimination or exclusion based on gender, ethnicity, disability, religion etc.?

Designing PMEL: Resources

- Have you reviewed capacity assessments and risk assessment to confirm you have the skills and resources to work safely and effectively with vulnerable participants?

- Are those supporting PMEL sufficiently experienced, and if not, how will you train and support them?

- Have you made necessary provisions for checking references and criminal records for any staff hired for the PMEL (for example, consultants and data collectors) and have you checked the processes your partners use to carry out these checks?

- Have you conducted an orientation on the child safeguarding policy and the prevention of sexual exploitation and abuse (PSEA) policy for any staff hired for the PMEL (for example, consultants and data collectors) and have you checked the processes your partners use to carry out these checks?

Designing PMEL: Risk assessment

- Have you completed a risk assessment and associated ethical protocols that consider risks to participants, researchers and others as a result of the research? Has this been developed with the involvement and understanding of the whole PMEL team and any other relevant stakeholders?

Designing PMEL: Pilot test

- Have the tools been piloted in a similar location to where the PMEL will take place and using the PMEL team that will conduct it? (Note: the items included in this checklist of questions should be adhered to during the pilot test.)

Implementing PMEL: Confidentiality

- Are PMEL teams aware that all personal information gathered must be treated with the strictest confidence, not disclosed to third parties and not used for any other purpose participants have not consented to?

- Will all identifying information for individuals, organisations, institutions etc. be changed and is a coding system in place?

- Will questionnaires or interview transcripts be anonymous or identifiable only by an identifier (pseudonym or code) and will lists of identifiers linked to names and/or addresses (or consent forms containing both) be stored securely and separately from data collected?

- Do you have measures in place to protect data on site and when travelling?

- For group discussions: will participants be made aware of confidentiality concerns and ground rules of discussion? If children are participating, will this be further elaborated through a game or exercise to support children's understanding and internalisation of the information?

- Will only a specific, named, and small number of the PMEL team have access to data, and will it be saved on a secure server?

- Has a timeframe for data to be kept been set and who is responsible for destroying the information at the appointed time?

Implementing PMEL: Child safeguarding

- Do you have a procedure in place for handling any child safeguarding cases (including abuse, distress and separation) identified or reported during PMEL? Does the procedure outline how cases should be handled, who should handle them and the timeframe and format for reporting them to the responsible team member?

- On each day of fieldwork (including piloting) will a Child Safeguarding Focal Point be present who is responsible for handling any child safeguarding cases? Do all PMEL team members have contact information for this person, and will this person remain behind for a period of time after the interviews/focus group discussions to handle any concerns that arise?

- Is the person responsible for handling child safeguarding cases sufficiently skilled and experienced to handle them directly or through a referral?

- If referrals are to be made, does the Child Safeguarding Focal Point have the contact information for referral agencies and has there been prior agreement with the referral agencies that they have the capacity to handle possible referrals?

- If the PMEL is likely to be upsetting:

  - At least one week before PMEL launch, will potential participants be made aware of the nature of the PMEL and the kinds of questions that will be asked, through either an explanation or an information sheet?

  - Has the PMEL team been trained on how to respond if a child becomes upset?

  - Will the Child Safeguarding Focal Point have no other roles to perform during the research (this is important if it is likely that s/he will be fully engaged with supporting participants who are upset or reporting child safeguarding concerns)?

Implementing PMEL: Train PMEL team members

- Have PMEL team members been involved in developing the ethical protocol, and been trained in associated issues and in how to follow the protocol, including through reflecting on their own values, beliefs and practices towards the participants and subject matter?

- If relevant, have you trained PMEL team members to work with children?

- If relevant, have you trained PMEL team members to interpret/translate questions in a way that maintains the original meaning and tone of the question, without making additional comments?

- If the research involves interpreters, have you briefed interpreters on child-friendly communication and attitudes? And on other issues around ethics?

Implementing PMEL: Form teams

- Will data collection teams have at least two team members?

- Do all team members know where other team members and supervisors are and where to go/who to contact in emergencies?

- Will resources such as counselling be available to team members? This is especially important as stress, anxiety and emotional strain can be experienced by those working with individuals discussing domestic violence, sexual abuse, migration experiences and other psychosocial trauma.[2]

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[2] Laws, S. and Mann, G. (2004) So you want to involve children in research? A toolkit supporting children's meaningful and ethical participation in research relating to violence against children. Save the Children. https://resourcecentre.savethechildren.net/document/so-you-want-involve-children-research-toolkit-supporting-childrens-meaningful-and-ethical/

Implementing PMEL: Plan logistics

- Have you consulted with the gatekeeper and participants/caregivers, where possible, on a convenient day, time and venue?

- Is the venue safe and accessible for participants and PMEL staff to get to (e.g., avoiding travel after dark)?

- Is personal protective equipment needed to protect the health and well-being of PMEL staff and participants?

- Will the PMEL take place at a time that suits participants and does not interfere with work or school (taking into account where parents need to accompany children)?

- If participants need to be transported to the venue, have you arranged safe and accessible transportation?

Implementing PMEL: Informed consent and assent

- Has a script or checklist for introducing all key points about the PMEL, the nature of participation, and the right to end a session at any time been prepared, using language that is appropriate, clear, and jargon-free for those who will be involved? Have PMEL team members been trained to use it?

- Have you considered whether specific compensation for participation, if provided (e.g., for transport, loss of earnings, refreshments), will affect the voluntary nature of consent?

- From the outset, will all participants be given information about the PMEL, including the nature of the questions to be asked, before deciding whether to participate (e.g., an information sheet or a prior briefing in the local language)?

- Will participants be informed of the realistic end uses of the PMEL?

- Will the fact that participants will not receive incentives be explained during the process of seeking consent, and will PMEL staff be trained to address any misconceptions about this during consent discussions?

- Have you adapted the consent form for the purposes of this PMEL and trained PMEL staff on how to use it?

- Where caregivers consent on behalf of children, will children be asked if they agree ('assent') to take part as well? Note that if the child is unaccompanied, it may be appropriate for their social worker/case worker to consent on their behalf.

- Where children are of an age and level of maturity that they can consent on their own behalf, will caregivers be asked if they agree ('assent') to their child taking part as well? (This may not be appropriate for some topics, e.g., sexual and reproductive health, where parents may deny the child the opportunity to participate. Culture and context may need to be taken into account.)

- If caregivers and vulnerable participants disagree on consent, do you have a process in place for managing this?

- Do you have a protocol in place to record consent, ideally through a signature on a form, together with the signature of the PMEL team member who took the consent, or an audio recording of the participant saying that they give consent?

- Will all participants be told that they can withdraw at any time, ask for their interview recording to be destroyed and/or their data removed until it is no longer practical to do so (noting when this is)?

- For extended research (e.g., action research and participatory research longer than a focus group): will you periodically ask how participants are feeling about the process, checking whether they remain willing to participate?

Key areas to consider in greater depth

Determine priorities to shape projects and PMEL

Prioritising project activities and investments is a critical part of project success so that limited resources and funding can be targeted to the most essential areas. Thus, this is also an important part of PMEL.

Prioritising best practices requires you to:

- Assess your own funding, staff and participant strengths, capacities and bandwidth.

- Rank activities considering both impact and effort.

- Expect setbacks and assess the potential for losses or negative impacts.

- Attack the most time-sensitive and highest-impact activities first.

- Be flexible with your prioritisation process and learn to say no for now. Other activities may be addressed in future work.

Revisit objectives

Just as important as analysing priorities is ongoing learning and revision of your project as a result of PMEL. When objectives are not re-examined, challenges arise. Therefore, it is crucial that you revisit your objectives and consider any challenges including, for example:

- The discovery that your theory of change is no longer logical, and that its assumptions are no longer valid.

- Insufficient resources.

- The need to completely redesign the project, which can be expensive, time consuming, and complex.

- Participant attrition due to shifts in their engagement, location, etc.

- Vague or continuously changing expectations for impacts communicated to donors.

The objectives can be revisited in the [Monitoring Strategy Template](#).

Key benefits of revisiting objectives, however, include:

- Promotion of a culture of learning and data-driven decision-making.

- Adaptability to improve activities and address challenges faster.

- Project performance improvements.

- Increased efficiency.

- Greater transparency and accountability.

- Better allocation of physical, technological, human, intellectual and financial resources.

- Room for innovation.

Key questions to ask include:

- What are the advantages and disadvantages of keeping programmes flexible during the lifetime of your project activities?

- How might this help or influence the desire of targeted communities to seek the care and support they need from your project?

- In the evaluations that are carried out, what can be done to ensure that results are useful and credible and will be used?

- How is learning among staff and peers being captured and communicated?

PMEL generally does not fit the definition of human subject research meaning that Institutional Review Board (IRB) approval is not required.[3] The decision tree below can support with clarification; however, it is important to remember that standards can differ across contexts.

```
                                    Are you testing a hypothesis/
                                    answer to a research question?
                                              │              │
                                              ▼              ▼
                          ┌──────────────┐        ┌────────────────────────┐
                          │     Yes      │        │ No. Likely this is not  │
                          └──────────────┘        │ human subjects research │
                                 │                │ and does not need IRB   │
                                 ▼                │ approval                │
                   Will others outside this       └────────────────────────┘
                   particular programme/initiative
                   be positively impacted by the
                   monitoring/evaluation?
                          │              │
                          ▼              ▼
              ┌──────────────┐    ┌────────────────────────┐
              │     Yes      │    │ No. Likely this is not  │
              └──────────────┘    │ human subjects research │
                     │            │ and does not need IRB   │
                     ▼            │ approval                │
         Is the monitoring/       └────────────────────────┘
         evaluation conducted
         regularly or on a routine
         basis?
            │              │
            ▼              ▼
  ┌────────────────┐  ┌──────────┐
  │ Yes. Likely    │  │    No    │
  │ this is not    │  └──────────┘
  │ human subjects │       │
  │ research and   │       ▼
  │ does not need  │  Are those in charge of data
  │ IRB approval   │  gathering in contact with the
  └────────────────┘  initiative data/subjects on a
                      regular, routine basis?
                          │              │
                          ▼              ▼
              ┌────────────────┐   ┌──────────┐
              │ Yes. Likely    │   │    No    │
              │ this is not    │   └──────────┘
              │ human subjects │        │
              │ research and   │        ▼
              │ does not need  │   Is the monitoring/
              │ IRB approval   │   evaluation disruptive to
              └────────────────┘   day-to-day operations?
                                      │              │
                                      ▼              ▼
                          ┌──────────────┐   ┌────────────────────────┐
                          │     Yes      │   │ No. Likely this is not  │
                          └──────────────┘   │ human subjects research │
                                 │           │ and does not need IRB   │
                                 ▼           │ approval                │
                   Is the client paying for  └────────────────────────┘
                   the M&E the same as the
                   entity running the evaluation?
                          │              │
                          ▼              ▼
              ┌────────────────┐   ┌──────────┐
              │ Yes. Likely    │   │    No    │
              │ this is not    │   └──────────┘
              │ human subjects │        │
              │ research and   │        ▼
              │ does not need  │   Is the monitoring/
              │ IRB approval   │   evaluation part of the
              └────────────────┘   initative being
                                   monitored/evaluated?
                                      │              │
                                      ▼              ▼
                          ┌────────────────┐   ┌──────────┐
                          │ Yes. Likely    │   │    No    │
                          │ this is not    │   └──────────┘
                          │ human subjects │
                          │ research and   │
                          │ does not need  │
                          │ IRB approval   │
                          └────────────────┘
```

Note: Draws from IRB Toolbox: Program evaluation: When is it research?

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[3] Ethical guidelines for working with displaced populations; IRB Toolbox: Program evaluation: When is it research?; Informed Consent Checklist; IRC Research Toolkit; Inclusion with protection: Obtaining informed consent when conducting research with adolescents

Resources

Arnot, L., Martinez, L., Wall, K., Blaisdell, C. and Palaiologou, I. (2020) Reflecting on three creative approaches to informed consent with children under six. *BERJ Special Issue: Ethical Questions in Educational Research.*

CIOMS (2002) *International ethical guidelines for biomedical research involving human subjects*.

CIOMS (2009) *International ethical guidelines for epidemiological studies*. Geneva: CIOMS.

Core Humanitarian Standard

IRB Toolbox: Program Evaluation: When is it research?

International Rescue Committee Informed Consent Checklist: IRC Research Toolkit.

Laws, S. and Mann, G. (2004) *So you want to involve children in research? A toolkit supporting children's meaningful and ethical participation in research relating to violence against children*. Save the Children.

Sandri, E. (2020) *Ethics in evaluation: Why it is important*. ITAD Blog, 10 March.

Santelli, J., Haerizadeh, S. and McGovern, T. (2017) *Inclusion with protection: Obtaining informed consent when conducting research with adolescents*. Innocenti Research Brief. Florence: UNICEF Office of Research – Innocenti.

Save the Children (2020) Tipsheet: Remote & Digital Data Collection & COVID-19. Save the Children.

Singh, J.A., Siddiqi, M. and Chandra-Mouli, V. (2019) World Health Organization guidance on ethical considerations in planning and reviewing research studies on sexual and reproductive health in adolescents. *Journal of Adolescent Health*, 64 (4), p. 427–429.

UK Government (2020) *FCDO Ethical guidance for research, evaluation and monitoring activities*.

United Nations Children's Fund (UNICEF) (2012) *Ethical principles, dilemmas and risks in collecting data on violence against children: A review of available literature*. New York: United Nations Children's Fund Statistics and Monitoring Section, Division of Policy and Strategy.

Van den Berg, R.D., Hawkins, P. and Stame, N. (eds.) (2022) *Ethics for evaluation beyond 'doing no harm' to 'tackling bad' and 'doing good'*. First Edition. Routledge.

Women's Refugee Commission (2014) *Ethical guidelines for working with displaced populations*. New York: Women's Refugee Commission.

Collecting data

Data collection: Quantitative, qualitative, and mixed methods

In general, there are three broad categories of data collection. Quantitative data collection seeks to capture specific numerical values, amounts or ranges that measure a specific topic. Methods include surveys (mobile, online and in-person) using rankings, some face-to-face and remote interviews, and long-term longitudinal studies.

Qualitative data, on the other hand, seek to capture observations, opinions, perspectives, stories or narratives. Such information, obtained via open-ended questionnaires, interviews, group discussions, field notes and observations, can be important to contextualise situations. As you may guess, mixed methods use a combination of quantitative and qualitative data collection and provide an important means of capturing a fuller picture of the ecosystem in which you are working.

To establish which type of data you should collect, it is important to carefully consider the criteria that will frame your PMEL. (See Tool: The Evaluation Matrix).

A range of data collection tools can be referred to later on in this toolkit.

Choosing evaluation criteria to frame PMEL

There are numerous criteria you could use for PMEL. Here, two sets of globally recognised criteria that are widely referenced and used, in whole or in part, with or without additional specific criteria, are discussed. Your selection will depend on donor/funder priorities and targeted community needs. PMEL of practice underscores how selection should incorporate CSOs' understanding of what you need in order to evaluate your own practices and, alongside your peers, support each other through the process, facilitating learning and exchange as you go.

OECD DAC criteria for evaluating development assistance

The OECD Development Assistance Committee (DAC) has developed six evaluation criteria to keep in mind when evaluating development projects.

- **Efficiency:** How well are resources being utilised?

- **Coherence:** How well do the project activities fit in with the community?

- **Relevance:** Is the intervention doing the right things for the community? To what extent are the objectives valid? Are the activities and outputs in line with the project goal?

- **Effectiveness:** To what extent are the objectives achieved? Is the project cost-effective?

- **Impact:** What difference does the intervention make? What happens as a result of the programme or project? What real difference does the activity make to the targeted communities? How many people are affected?

- **Sustainability:** Will the benefits last? To what extent did the benefits of a programme or project continue after donor funding ceased?[4]

Core Humanitarian Standard

An accountability framework intended to capture key components of 'principled, accountable and high-quality support and assistance' for people vulnerable to or impacted by crisis, the Core Humanitarian Standard resulted from a highly participatory process involving crisis-affected individuals, humanitarian actors, national and international humanitarian organisations and networks, and government officials. It includes nine commitments, each with a quality criterion that can also be used to frame PMEL.

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[4] OECD (1991) Principles for evaluation of development assistance. Paris: OECD https://www.oecd.org/dac/evaluation/2755284.pdf; OECD. OECD Evaluation Criteria. https://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm

The Nine Commitments	
Commitment	Quality criterion
1. Communities and people affected by crisis receive assistance appropriate and relevant to their needs.	Humanitarian response is appropriate and relevant.
2. Communities and people affected by crisis have access to the humanitarian assistance they need at the right time.	Humanitarian response is effective and timely.
3. Communities and people affected by crisis are not negatively affected and are more prepared, resilient and less at-risk as a result of humanitarian action.	Humanitarian response strengthens local capacities and avoids negative effects.
4. Communities and people affected by crisis know their rights and entitlements, have access to information and participate in decisions that affect them.	Humanitarian response is based on communication, participation and feedback.
5. Communities and people affected by crisis have access to safe and responsive mechanisms to handle complaints.	Complaints are welcomed and addressed.
6. Communities and people affected by crisis receive coordinated, complementary assistance.	Humanitarian response is coordinated and complementary.
7. Communities and people affected by crisis can expect delivery of improved assistance as organisations learn from experience and reflection.	Humanitarian actors continuously learn and improve.
8. Communities and people affected by crisis receive the assistance they require from competent and well-managed staff and volunteers.	Staff are supported to do their job effectively, and are treated fairly and equitably.
9. Communities and people affected by crisis can expect that the organisations assisting them are managing resources effectively, efficiently and ethically.	Resources are managed and used responsibly for their intended purpose.

Pillars to support PMEL of practice

Whether you conduct PMEL face-to-face, remotely, or using a combination of the two, it is rarely straightforward or entirely predictable. Instead, it is generally a balancing act due to the diversity of targeted communities; the differences in knowledge, skills, and experience among your staff; the dynamic nature of contexts; and the push and pull of external stakeholders such as governments, partners and donors/funders.

Thus, this section of the toolkit considers three pillars underpinning PMEL and specifically PMEL of practice. These pillars are **inclusion**, **adaptation**, and **technology**.

Inclusion

Inclusion in PMEL relates to the practice or policy of ensuring the needs and perspectives of individuals from targeted communities, who may be overlooked otherwise, are captured. PMEL that is inclusive highlights the active engagement of these individuals across any of the phases of M&E.

Individuals may be excluded for any number of reasons. The table that follows offers some suggestions for you to consider which focus specifically on ensuring that children and youth aged 3–17, people with disabilities, and girls and women, are included in evaluation work.

Children aged 3–12	Children aged 13–17	People with disabilities	Girls and women
Innovative ways of seeking informed consent may be used such as animated videos coupled with ethical statements, narrative picture books coupled with ethical statements, or physical/digital games coupled with ethical statements. PMEL staff should decide if parents or guardians can/should be present or if the	While potentially expressing greater agency and maturity, this age group still requires informed consent be given by a responsible adult. While this age group can often read/sign an ethical statement written with familiar terms, it should also be carefully explained, and the facilitator should ask	When conducting local needs assessments upon entering new communities, pay close attention to understanding the specific health, education, livelihood, and infrastructure needs of people with disabilities, as they frequently face physical, economic, and political barriers as well as stigma.	Consider the time constraints women and girls often face as they bear much of the burden of work, household responsibilities and childcare, which can limit their availability to participate, including in PMEL. Ascertain the extent to which traditional norms and cultural constraints exist

child should be alone with a trained child specialist. If work is sensitive, a specialised staff member working alone with the child should be considered. Strongly consider media, games and the arts to assist children to fully express their feelings and perspectives. Keep 3–7-year-olds separate from 8–12-year-olds as well as other age groups due to their cognitive abilities, education and psychosocial maturity.	questions to verify understanding. If the child cannot read the informed consent statement, consider one of the innovations for children aged 3–12. Depending on cultural acceptance, it may be possible to introduce more sensitive topics such as sexual and reproductive health. While media, games, and the arts are still important tools to engage this age group, it may be possible to include more reading tasks and independent forms of participation if literacy levels allow. Keep 13–17-year-olds separate from other age groups due to their cognitive abilities, education and psychosocial maturity, allowing for deeper engagement and introduction of more mature topics than if they were in a group of younger children.	For similar reasons, ensure data is collected that specifically focuses on people living with disabilities and captures specifically what those disabilities are so that it can be disaggregated, filling a frequent gap in data available. For children with disabilities, data may already be accessible through, for example, household surveys, such as UNICEF's Multiple Indicator Cluster Survey (MICS) which includes data on disability in its Child Functioning Module. In many cases, resources may not be available to hire specialists in disability-inclusive work. Thus, all staff should be trained in this area. If not possible, reach out to specialists and organisations that work regularly with people who have disabilities.	which can limit PMEL participation (e.g., women and girls' ability to interact with a male enumerator, lack of freedom of movement, norms that discourage discussion of sensitive issues such as sexual and reproductive health, menstruation, childbirth, etc.). Ascertain whether limited access to banking may limit PMEL participation (i.e., inability to pay for public transport to a venue, or to pay for materials). Ascertain what role access to other resources such as technology and a car may play in participation in PMEL. Limited access to resources and opportunities should be considered, as well as levels of literacy, both traditional and digital. Alternative approaches such as working with pictures in place of text or having enumerators work with women to complete surveys should be part of PMEL planning and implementation. Mitigate any risks of retribution or negative impacts on the women and girls you plan to work with. Collaborate to reach consensus on a common language to discuss gender topics.
For single or double orphan status children, PMEL staff must focus on minimising any psychosocial stress for the child, respecting the child's rights and suspending work if the child is experiencing trauma.			
Resources Arnot, L.; Martinez, L. and Wall, K., Blaisdell, C. and Palaiologou, I. (2020) Reflecting on three creative approaches to informed consent with children under six.		**Resources** Centre for Services and Information on Disability (CSID)	**Resources** UN Women: The United Nations Entity for Gender Equality and the Empowerment of Women.

BERJ Special Issue: Ethical Questions in Educational Research. Family for Every Child *Safeguarding Policy*. UNICEF *Convention on the Rights of the Child text*. UNICEF *Ethical guidelines for reporting on children*. UNICEF (2012) *Ethical principles, dilemmas and risks in collecting data on violence against children: A review of available literature*. New York: UNICEF Statistics and Monitoring Section, Division of Policy and Strategy.	UNICEF (2017) *Including children with disabilities in humanitarian action – General guidance*. United Nations DSPD and DESA *Toolkit on disability for Africa: Disability-inclusive Development*. Family for Every Child *Disability Toolkit*	UN Women *Generation Equality Forum: Accelerating progress for gender equality*. UNICEF *Convention on the Rights of the Child text*.

Decision tree to determine who is a 'responsible adult' for informed consent

Is a parent available? — Yes → Seek informed consent from the parent.

No ↓

Is a court- or parent-appointed guardian available? — Yes → Seek informed consent from the court- or parent-appointed guardian.

No ↓

Is a foster parent available? — Yes → Seek informed consent from the foster parent.

No ↓

Is a caregiver available? — Yes → Seek informed consent from the caregiver.

No ↓

Engage a responsible or trusted adult nominated by the child to provide informed consent.

PMEL should be adaptable to specific contexts and the opportunities and challenges found there. Adaptations are informed by targeted communities and their needs. For example, prior to launch, it is important to understand the contexts in which you will work, including norms, priorities and values, as well as practical considerations such as languages and dialects spoken, the local calendar (e.g., elections, religious holidays, harvests) and infrastructure (e.g., roads, internet access). This can be accomplished through desk research but particularly by reaching out to community members themselves.

Adaptations can also emerge as a result of the lessons you have learned through your own practice and lessons shared through peer-to-peer exchange with other CSOs. The NAP Global Network has developed guidance based on approaches piloted during their international learning and knowledge events (Targeted Topics Forums) which convene groups that may be unfamiliar with each other and even have very different perspectives. This guidance, outlined below, can help to support learning exchange within your organisation as well as with other CSOs.

1. Purpose: What do you want to achieve during this learning exchange?

2. Context: What contextual considerations might shape the learning exchange?
Political/economic/social/technological/legal/environmental/geographical
Consider the local as well as the national, regional, and international levels.

3. Who needs to be present? What are the characteristics of these individuals (e.g., power dynamics, level of familiarity/expertise in the topic area, level of trust, collaboration history)?

4. How can power be shared? For example, can the event be co-facilitated? Can a survey be sent out beforehand so that individuals can express their interests and key areas of concern?

5. Where will learning exchange happen? Consider the possibilities of information and communication technology if cost and distance are issues.

6. How can you accomplish the purpose you have set forth?
It is important to keep in mind that learning exchange and subsequent knowledge co-creation is unlikely to be a linear process. Expect divergent ideas and insights before arriving at consensus together.

7. How can you monitor and evaluate the learning exchange and knowledge co-creation before, during, immediately following, and in the medium and long-term?

Resources

Fisher, C. and Harvey, B. (2019) *Facilitating peer learning with adaptation policy-makers: Approaches and insights from the NAP Global Network's Targeted Topics Forums*. International Institute for Sustainable Development (IISD).

The Rockefeller Foundation (2022) *Convening Design 2022*.

Powercube.net

Information and communication technology (ICT)

PMEL during the COVID-19 pandemic presented unprecedented challenges as a result of physical distancing and lock-down measures. Collecting, analysing, synthesising, and sharing data and learning frequently incorporated ICT, including landline phones and smartphones; short messaging services (SMSs) like WhatsApp; social media platforms; drones; and geodata.

There is great potential of ICT for PMEL and refinement of its application, especially in circumstances lacking resources, where migration is occurring, or where targeted communities are located in remote areas or geographies that are in conflict or are unsafe, emerged. Among the greatest of these: the potential to reduce labour, staff time and the resources required to translate paperwork into digital formats often used for analysis to support subsequent learning.

At the same time, ethical considerations can arise, including over-collection of data and/or under-utilisation of it for decision-making for programme and practice development and improvement. Also, as a PricewaterhouseCoopers survey from 2020 showed, M&E experts report a lack of knowledge to enable them to choose the best digital data collection practices (79 per cent) and analysis tools (87 per cent).

Additional challenges encountered among targeted communities and PMEL staff include:

- Insufficient knowledge of ICTs and digital tools.

- Lack of access to devices (e.g., landline phones, smartphones, tablets, drones).

- Gaps in resources and/or additional resource requirements (e.g., additional costs for charging devices, lack of staff capacity to analyse collected data, etc.).

- Insufficient digital literacy/fluency.

- A lack of personal connection.

- Collection of data that is useless, as well as its over-collection, potentially resulting in participant fatigue.

As PricewaterhouseCoopers find:

"Indeed, investing heavily in a tool that looks potentially beneficial and offloading it onto an organization will most probably not result in the desired effect. In addition, testing new technologies without knowing their effect on targeted communities – which are often vulnerable populations – is an unacceptable risk." (PricewaterhouseCoopers, 2019, p.4)

This underscores the importance of PMEL of practice when it comes to selecting and integrating technology.

Once you have decided to integrate ICT into your projects the next step is to draw from global best practices for digital development to determine tools and solutions that make sense within the context of your own organisation and the communities with whom you work, so that these tools and solutions

can be integrated across the project lifecycle.

The Principles for Digital Development (pictured), offer a framework to support CSOs in using ICT to its fullest potential. Building on a foundation of various previous principles, the current principles were developed through a collaborative process among The Bill and Melinda Gates Foundation, the Swedish International Development Agency (SIDA), UNICEF, UNDP, the World Bank, the U.S. Agency for International Development (USAID), and the World Health Organization (WHO). The figure pictured takes the nine principles and demonstrates how they can fit across a project lifecycle.

The principles are explained by presenting their core tenets; recommendations, tips and resources compiled through a collaborative process to offer suggestions for how each principle can be applied across the project lifecycle; and resources. The recommendations, tips and resources for M&E, presented as a cross-cutting project phase, can serve as a starting point for CSOs to evaluate their own practice as well as for peer-to-peer learning.

Resource

PricewaterhouseCoopers (2019) *Challenges and solutions in monitoring & evaluating international development cooperation. Exploring the role of digital technologies and innovation methodologies*. PwC Netherlands. https://www.pwc.nl/nl/assets/documents/challenges-in-digital-innovation.pdf

Principles for Digital Development

Tools overview

The table below provides a summary of all the tools covered in this section, grouped into **tools for prioritisation**, **tools for planning** and **tools for data collection**. Each entry includes a description and key considerations for use. Should you wish to learn more, navigate to each tool section by clicking on the tool's name in the table and look for the following:

  which indicates a tool is introduced

  which indicates examples to help understand the tool

  which indicates tips for using the tool.

Where possible, templates for different tools are also provided.

Tools for prioritisation		
Tool	**Descriptions and connection to PMEL**	**Key considerations**
Problem prioritisation community mapping activity	How can programme staff identify the most urgent challenges in communities? How can they best prioritise these potentially competing challenges? These questions are key to effective problem-solving and to developing engaging projects which address a community's most urgent challenges. This activity is for use with community members themselves, rather than among your programme staff. **Resource** Werner, D. and Bower, B. (1982) *Helping health*	How do programme staff make sure that all the relevant stakeholders are engaged? How do we make sure that all of the most important issues are included? How do we take account of community dynamics and personalities to ensure that certain voices in a group discussion don't dominate, influencing the listing and ranking of issues? How do we make sure that all voices and groups can contribute equally to prioritisation? How do we ensure that the timing of sessions takes account of constraints on some community members' time (i.e., work, travel time, family responsibilities) and their security concerns, so

	workers learn: A book of methods, aids, and ideas for instructors at the village level.	that particular groups are not excluded from engaging?

How do we ensure that group bias for (or against) an organisation or its initiatives does not undermine discussion?

How do we avoid the exclusion of certain groups, e.g. children or other stakeholders with disabilities, who may be affected by an intervention? |
| Prioritisation grid method | This tool measures the urgency, impact, effort, risk, and outcomes of your project as viewed by community members. | How do we make sure that this method, which relies on individual perspectives, goes into enough detail, and does not become overly subjective? How can facilitators ask the right questions to understand why participants believe certain activities are (or are not) critical for targeted communities as well as how and why (or why not) the activity can be accomplished with the level of effort available from staff? |
| The MoSCow prioritisation method | This method of prioritising project activities, initiatives, and products was created by software development expert Dai Clegg. However, its practicality and efficiency make this tool highly adaptable, including for development intervention work.

This framework enables you to decide whether an activity should be included in your intervention. You can then determine, based on the resources and capacities you have available, which activities can actually be included and which need to be moved to another project or a future intervention.

Resources

Agile Business Consortium. *Moscow prioritisation*.

Weller, J. (2021) Everything you need to know about scoring models in project management. Smartsheet. | How can you make sure that scoring is applied consistently and relevant stakeholders are included so that activities are categorised correctly?

If your staff are already biased for (or against) an initiative, findings from the MoSCoW method may not represent the realities on the ground. |

Tools for planning

Tool	Descriptions and connection to PMEL	Key considerations
Stakeholder analysis	A tool to identify your partners, stakeholders, and targeted communities prior to programme launch. It allows, by mapping organisations and individuals, a better understanding of the country or local context, the area of your work, a recognition of potential organisations where synergies exist, prevention of activity overlap/redundancy, and recognition of gaps in services or access.	How can we ensure that when a stakeholder analysis is undertaken by those outside communities this does not lead to subjective bias and unfounded assumptions? How can we approach cases where stakeholders resist engaging or sharing information with our organisation? How can we support stakeholders to reach a consensus when they have different perspectives on priorities? Staff resources may limit time that can be spent communicating with other organisations.
Stakeholder analysis prioritisation framework	This offers a helpful framework through which to consider your stakeholders in terms of who needs to be kept satisfied, who needs to be actively engaged, who needs to be kept informed, and who needs to be monitored. **Resource** Smith, L.W. (2000) *Stakeholder analysis: a pivotal practice of successful projects.*	How will we approach any hidden or conflicting agendas within our organisation or among stakeholder groups? How will we ensure that we have in place the strong analytical and interpersonal skills needed to clarify these different groups?
Theory of change	A theory of change is a highly participatory process used to engage all your stakeholders to pinpoint the inputs and ecosystem considerations needed to achieve impact. Inputs, which are activities as well as resources, give rise to outputs, outputs lead to outcomes, and finally outcomes lead to impact. Assumptions exist in the background of this roadmap and, if things that were assumed take an unexpected turn, they may create obstacles to achieving expectations. **Resources** Center for the Theory of Change. *Setting standards for theory of change*. United Nations. *Theory of change UNDAF Companion Guidance.*	How can we revisit our theory of change if we need to adjust for rapid shifts in the environments where our interventions are being implemented? How can we best allow for the fact that assumptions may change over the duration of our project?
Problem and objective trees	This tool enables you to specify the challenges that your project will address (the problem tree). It then allows for an outline of the solutions your project will implement to address these challenges (the objective tree). **Resource** Center for Civil Society and Nonprofit Management, Khon Kaen University (2004) *Objective tree analysis*.	How can we use problem and objective trees to support our analysis and capture our project's ideas and objectives? How can we best use this tool to keep the focus on determining which objectives will lead to problems being addressed? How can we ensure that we are careful when transforming problems into their corresponding objectives?

Logical framework	As a planning and project management tool, the logical framework, or log frame, supports the design of overall goals intended to emerge from a results chain of inputs (activities and resources), outputs, indicators and outcomes against a background of assumptions and risks. **Resources** DFID (2011) *Guidance on using the revised Logical Framework*. DfID practice paper. Tools4Dev.org. *How to write a logical framework*.	How can we use the logical framework to demonstrate to the donor or funder the thought and planning that we have put into determining how the activities and resources they fund will deliver on our project's goals?
Risk assumptions table	This visualisation tool supports your reflection on who the potential stakeholders for your project are and the levels of influence they are likely to have on the journey to impact. This tool would also help in identifying the risks related to country context, situations, policies etc. **Resource** USAID. *Project Assumptions Risk Analysis Template*.	
Risk matrix	This tool enables you to further analyse and plan for project risk mitigation. This method, instead of focusing on the risks themselves, focuses on stakeholders in communities that are in support of, ambivalent to, or directly opposed to project activities.	
Strengths, weaknesses, opportunities and threats analysis	Commonly shortened to SWOT analysis, this tool supports consideration of the strengths, weaknesses, opportunities, and threats for your project to promote resource optimisation, identify potential ways to redirect activities and resources to offset challenges, and reduce the risk of failure. **Resource** Community Toolbox. *Section 14. SWOT analysis: Strengths, weaknesses, opportunities, and threats*.	As well as using the SWOT analysis tool for planning, how can we also use it to re-evaluate inputs at different phases of the project cycle and to explore the potential for project scale up and greater efficiency?
Evaluation matrix	The evaluation matrix is a tool that supports PMEL as you consider questions and sub-questions that need to be asked to measure against specific criteria and data sources. The matrix also enables you to consider the data collection and analysis approaches that will be carried out.	How can we use this tool as a visual check to verify that data is collected in a way that can be triangulated? This serves as a check for consistency and enables more in-depth understanding of the data.

Tools for data collection

Tool	Descriptions and connection to PMEL	Key considerations
Literature review matrix	This tool is used to review a range of literature and documents from credible and reliable sources, including the programme you are monitoring and evaluating. **Resource** Purdue University Online Writing Lab. *Writing a literature review*.	Some literature is behind paywalls and may not be accessible without expensive subscriptions. How can we ensure that we take into account the authorship and publisher of the literature we review, and thus any potential biases or conflicts of interest which may affect results or the presentation of findings? When accessing statistics, accuracy regarding dates is important to ensure comparisons are valid and that any conclusions drawn are likely still relevant.
Face-to-face data collection	Face-to-face data collection includes site visits, observations, surveys, interviews, focus groups, and validation workshops undertaken on site within communities where your organisation works or where activities are being implemented.	How can we ensure that we adequately consider safeguarding issues while interacting with certain groups of stakeholders? Some groups of stakeholders may not want or be able to interact or share correct information. For example, children with disabilities may not properly share because of language barriers.
Remote data collection	Remote data collection uses tools, such as telephones, smart phones, tablets, and computers as well as applications, like Zoom, WhatsApp, and Facebook Messenger, and platforms, such as Mapbox, to facilitate the collection of data. The data collected can range from survey responses to interviews, focus groups, and location data, among others. **Resources** World Bank. *Remote training on phone surveys*. Save the Children (2020) *Tipsheet: Remote and digital data collection & COVID-19*. MapBox. *Maps and location for developers.*	How can we ensure that our remote data collection is robust? Key factors include: • Determining whether participants or those involved in data collection will need specific technical skills or training. • Taking account of different issues from those considered with face-to-face data collection. These include access to devices, internet connectivity, and electricity, and cross-cutting factors such as gender and geography which may further limit reach. • When developing data collection protocols, factoring in unique ethical considerations as well as data management measures such as encrypting datasets, sharing data using proper procedures, anonymising personal identification information, and safeguarding login information.
Survey	This tool can take various forms and be disseminated using a variety of approaches. Surveys may be conducted using paper and pencil or verbally by enumerators. They may be developed using one of the many digital tools for survey collection including SurveyMonkey, Microsoft Forms, and Google Forms. **Resource** Personal communication, CINDI.	What will be the best approach to surveying? Consultations with community members can help with selecting the best approach. Real-time monitoring, or monitoring while surveying is in progress, can alert you to any issues with data collection and let you know if an alternative approach is needed. How can we think creatively about the approach used? For example: • Picture-based surveys: Using illustrations, photos, or other visuals can support the participation of young children, those not yet able to read, and/or adults who are illiterate or have low literacy. In cases where literacy levels are low, visual tools designed using pictures or illustrations in place of words can support

		data collection. Locally available and/or natural materials, like stones or beans, can be placed on the option selected by participants. Another approach can be considered in cases where picture-based surveys may not be suitable such as face-to-face data collection, interviews etc.
		• Locally available materials: These can be used to vote for or show agreement with statements shared verbally or using pictures. Possibilities include stones, beads, and beans. This approach saves money and can lend familiarity to the data collection process. Consideration should be made for the accessibility of writing and other materials for children with certain disabilities.
Interview	Sometimes referred to as Key Informant Interviews (KIIs), these are effective tools for collecting personal insights from stakeholders and targeted communities, whether conducted face-to-face or remotely. A **portfolio of evidence,** essentially a file where participants contribute their significant stories of change, can serve as a useful tool to support interviewers as it provides a point of reference in one place. Similarly, a **case management tool** captures case reporting, the referral system, and case follow-ups. A **home inventory** is an additional tool that can support interviewers, capturing the baseline and then effects from an intervention. **Resources** NIH National Library of Medicine (2011) Key Informant Interview Guide No. 4. Personal communication, Farm Orphan Support Trust, Zimbabwe. Personal communication, JUCONI México.	How can we use KIIs to promote more open sharing, especially of private, sensitive knowledge, perspectives, and experiences people may not feel comfortable sharing in a focus group? How can we best use this tool to ask thoughtful, open-ended and exploratory questions? One negative aspect of the portfolio of evidence approach is that if a participant is not literate, there is the risk that the interviewer can come across as asking leading questions. The case management tool is useful as it supports objective verification of cases by incorporating input from stakeholders, such as government social welfare departments and law enforcement, from different institutions at different levels. All members of a family need to take part in the development of a home inventory. To decrease bias and issues of memory, events from the day before the inventory is conducted are used for reflection. Basic principles of the home inventory include: • A focus on the child and their needs. • Assessment should be based on the child's development: this includes considering disabilities and how these can affect development. • The individual child's needs must be considered in the context of their family or their wider environment. Friendship groups and grandparent support, for example, should be taken into account.
Focus group	This tool enables you to gain efficient input into data collection by a range of stakeholders and community members and may promote discussion by allowing participants to build on each other's responses. A **spider tool** is designed to engage children and youth in a focus group setting, enabling	This approach is less conducive to data collection that is more private and sensitive. Additionally, it requires facilitators who understand gender, conflict and context-sensitive approaches. Remote focus groups may be challenging to conduct effectively. How can we ensure that adults are continuously involved in risk assessment in connection with

them to identify key quality elements and relevant indicators and to lead in the assessment process.

A **case study vignette** can be a useful tool for discussing sensitive topics as it presents a story that is 'one step removed' from the experience of the participant (Personal communication, CINDI).

Similar to case study vignettes, **media, such as movies, television and radio shows**, can serve as a starting point for discussions.

Resources

Feinstein, C. and O'Kane, C. (2005) *The spider tool: A self assessment and planning tool for child led initiatives and organisations.* Save the Children Sweden.

Academy for Educational Development Center for Community-Based Health Strategies (2005) *Facilitating meetings: A guide for community planning groups.*

Personal communication, CINDI.

Personal communication, JUCONI México.

children's participation, and that mitigation measures are in place to decrease or eliminate the risks they could face? A risk assessment should be carried out to ensure that participants will not be at risk of physical harm, emotional trauma, stigma, etc. as a result of their participation. Following participation, ongoing support should be provided to participants.

With focus groups that use media, it is important to consider equipment requirements as well as their maintenance and the potential for items to get lost, damaged or stolen. A number of technical skills may be needed, or training may need to be planned and budgeted for so that facilitators can run equipment or participants can use equipment themselves. If electricity is a challenge, consider whether solar-powered equipment might be used.

If media are not locally appropriate, in language/dialects needed, or are not specific enough to your project's themes, consider producing your own videos in partnership with the local community. This will empower your targeted communities as creators and owners of their own project success.

When you do use media with interviews or focus groups, make sure you have discussion-starter scripts. Pose certain questions at the beginning of your viewing to get viewers thinking. Then either pause throughout the viewing to ask questions that spur discussion, or lead a group discussion at the end of viewings.

While using a video approach, consider running the video with clear subtitles and sound.

[Workshop](#)	Workshops can be important tools for various purposes during PMEL. These include discussing evaluation questions and sub-questions, refining data collection tools so they are clear and concise, and validating the data which you have collected and analysed.	How can we design validation workshops to build consensus on PMEL findings? Questions to facilitate this process could include: Where do you agree with the findings? Where do you disagree? What refinements do you believe are needed for the recommendations delivered to be concrete, practical and useful?
[Storytelling](#)	Collecting and sharing stories of individuals, groups, and communities can be vital to ensure that data collection is representative. Useful platforms include news articles, blogs, academic publications, websites, social media, and television. **Resources** Copeland, S. and de Moor, A. (2018) [Community digital storytelling for collective intelligence: Towards a storytelling cycle of trust](#). *AI and Society,* 33, p. 101 –111. Dignified Storytelling. *[Dignified storytelling pledge](#)*.	Risks associated with this approach include lack of authenticity and transparency as well as stories being co-opted for ulterior motives or predetermined agendas. How can we make sure that storytellers not only tell their stories but are actively involved in their presentation? Digital storytelling and visualisation is one of the tools that can be used to connect with individuals as it communicates your insights through three essential elements: narrative, visuals, and data. Similarly, Photovoice is an exceptional and creative tool in which stories or situations can be illustrated using photographs. Respondents can reflect upon and explore the reasons, emotions and experiences that have guided their chosen images.

	Family for Every Child. *An introduction to digital storytelling*.	
Outcome harvesting	This is a retrospective evaluation tool through which stakeholders and targeted communities reflect and share what changes they have seen. From there, the project's role in and contributions to these changes (or lack of change) are discussed and captured. **Resources** ReliefWeb (2021) *Outcome harvesting: Best practices for learning & reflection*. AEA365 (2019) *How to make outcome harvesting gender-responsive and equity-focused Part II by Awuor Ponge*. USAID. *Outcome harvesting: Explaining observed outcomes by exploring health system strengthening and contextual contributions*. UVM.edu. *The Institute for Child and Family Well-Being: Practice brief, outcome harvesting*. Wilson-Grau, R. (2015) *Outcome harvesting*. Better Evaluation. Family for Every Child *Outcome harvesting manual*.	It is important to remember that outcomes may be positive or negative, intended or unintended, direct or indirect. This tool is particularly useful for projects implemented in complex circumstances and/or when impacts are gradual, as with, for example, behaviour change. Numerous benefits are possible with this tool including: ● Cultivating a sense of empowerment. ● Creating a feeling of shared responsibility. ● Encouraging sustainability beyond the lifetime of the project. ● Increasing the accountability of all stakeholders. ● Recognising unintended outcomes, which is extremely important, particularly when various factors can combine to shape project outcomes. However, some complex issues can arise: ● With so many stakeholders involved, language as well as power dynamics often emerge as obstacles and must be addressed/managed. ● It is not always easy to identify or be clear what contributes to changes that occur.
Diaries/journals	How can we use these to support stakeholders of all ages and literacy levels to capture their daily experiences and/or activities, and encourage reflection? **Resource** Wiseman, V., Conteh,L. and Matovu, F. (2005) *Using diaries to collect data in resource-poor settings: questions on design and implementation*.	Because they promote reflection, they can be therapeutic tools especially when traumatic events have occurred or are occurring. Key considerations with this approach include: ● Design: 　○ Structured or free form? 　○ Text or picture based? ● Time period. ● Frequency of entries. ● Who will keep the diary/journal and how they will be trained to do so? ● Implementation considerations: 　○ Frequency of collecting entries. 　○ Compensation for participation. 　○ Distribution and cost of materials. 　○ Approach to collecting and analysing data from entries.

Tools for prioritisation

✖ Problem prioritisation community mapping activity

1 Before deciding which challenges to begin discussing in your community group, organisation staff can visit different homes in the community. During these visits, families can be asked what they feel are their biggest problems and needs, bringing community perspectives in from the start. Private interviews with women and children may be advisable to make sure that they can openly discuss the issues they raise.

Useful question

What are the important challenges that affected you and your family this year?

- Specific to personal experience.

- Focuses on a specific timeframe.

- Likely to generate more objective answers based on experiences, leaving less room for assumptions of others.

Less useful question

What are the important challenges that people in your community face?

- Too general, broad.

- Not specific to individual experience.

- Leaves room for subjectivity, assumption, and inaccuracy.

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2 Assemble your group of key community members (for example, community leaders, teachers, health workers, guardians/fathers/mothers, etc.). Consider holding separate youth/child or vulnerable population group meetings to ensure participants can be open and vocal.

3 Begin with a blackboard, whiteboard, or flip chart and go around the group asking participants to share what they believe are their own and their family's most serious challenges. As a conversation starter, you could mention some of the ideas that were collected during initial household discussions. List these on your board/chart.

4 Have the group discuss and reach consensus on how common and serious they feel each challenge is in their community using numbers or plus (+) signs, for example:

Problem	How common?	How serious?	How important?
Alcoholism	+++++	++++	9
No employment opportunities	++++	++	6
Poverty	++++	+++	7
Discrimination	+++++	+	6
Community disruption	++	+++	5
Lack of education & awareness	+++	+++	6
Power control	+++++	++	7
Substance abuse	+++	++++	7
Depression	+++	++++	7
Mental illness	+++	+++++	8
Physical & emotional neglect	++++	++++	8
Illiteracy	+	++++	5
Social efficacy	+++	+++	6

5 Tally the results in an 'How important' column to quantify which are the highest priority issues in the community.

6 Tally and compare separate group results to determine community priority issues among different groups: parents, guardians, men, women, youth and children, vulnerable groups, etc.

💡 **Tips**

Hold separate group sessions so that individuals feel they are in a safe, protected and open environment where they can express their opinions (e.g. women-only groups, youth/child-only groups, community leader/influencer groups).

Be mindful to include people of diverse cultural backgrounds in groups (e.g., religions, ethnicities) and from across community sectors, paying particular attention to ensuring the attendance of people living in vulnerable groups (e.g., people living with disability, orphans).

Try to compensate for travel and time, if possible, to maximise attendance. Where possible, consider using technology to circumvent certain challenges to attendance.

As a facilitator, encourage quiet members of the group to speak; specifically, call on them if others are dominating conversation.

✕ Prioritisation grid method

1 Identify and assemble key staff members and support staff (e.g., staff, consultants, enumerators, facilitators).

2 On a chalkboard, whiteboard, flipchart or virtual board, draw two axes labelling the y-axis 'Importance to the targeted community' and the x-axis 'Feasibility for the organisation,' as shown in the figure below.
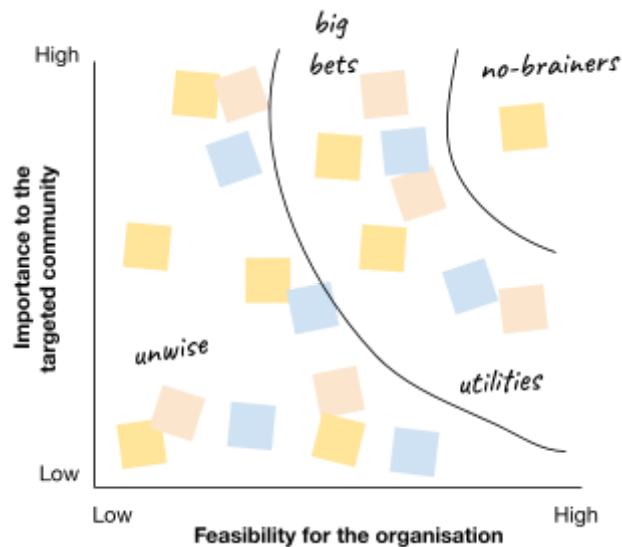
3 Hand out post-it notes to participants and ask them to write down their priority project activities. Then, one at a time, have each participant place the notes on the grid according to where they believe each fits in terms of benefits to stakeholders and the skills/capabilities of programme staff.

4 As shown in the figure, draw a line around the upper right quadrant to delineate activities which should definitely be included in the project. These are activities seen as having both value for the stakeholder and feasibility from an organisational perspective. Then, draw a line midway through the remaining quadrants to distinguish which activities should be prioritised.

💡 Tips

Organisational necessities like project management, human resources, donor/grant reporting, and operational costs must be budgeted for with all projects. These are needed project activities that have high value for the organisation though may not be quantifiable or seen as valuable by stakeholders.

It can be helpful to kick off discussion by presenting proposed activities, donor/grant requirements, and the situational background.

The MoSCow prioritisation method

1 Before convening the group, prepare an objective model of weighted scoring, so that your team can assess each activity listed against a standard list of cost-benefit criteria (see a weighted scoring guide here).

2 Convene a group of organisation staff, support staff, and key stakeholders.

3 Compile a list of potential and desired activities for your project. All group participants should agree on this list of potential activities to be prioritised.

4 Present the prepared standard model of weighted scoring.

5 Discuss until consensus is reached on the percentages of resources such as time, organisational member/staff level of effort, funding, technology, and training resources that can realistically be allocated to each activity.

6 Discuss which MoSCoW category is most appropriate for each project activity.

M	Must have: Non-negotiable initiatives that are mandatory for the team
S	Should have: Important initiatives that are not vital, but add significant value
C	Could have: Nice to have initiatives that will have small impact if left out
W	Will not have: Initiatives that are not a priority for this specific time frame

Tips

Prioritise based on:

- Budgetary constraints.
- Team skillsets, expertise, and strengths.
- Competing community needs.
- Alignment of community needs with outcomes proposed to the project funder/donor to ensure you can meet grant requirements to continue funding.

Tools for planning

Stakeholder analysis

1 Draw from your desk research to identify stakeholders currently working in your proposed project area.

2 List these stakeholders alongside a column outlining their organisational objectives and potential impacts on your project (i.e. funding, expertise sharing, partnership work sharing, advocacy, policy change).

3 Contact those key stakeholders identified to discuss their needs and expectations and the potential for partnership.

4 Align needs, expectations and partnership opportunities to risk mitigation strategies.

5 Plan prioritised communications and outreach strategies with stakeholders according to their importance to achieving project results and the sharing of knowledge about the evaluation.

Tips

Key informant interviews (KIIs), group sessions, and discussions with local partners at the outset of a project can minimise outsider bias and improve accurate stakeholder mapping.

Discussions with stakeholders, where time and staff effort allow, at the beginning and throughout the lifetime of a project, can help leverage staff time, budgets, and resources to improve overall programme impacts and the learning and knowledge sharing potential of evaluation of practice work.

✕ Stakeholder analysis prioritisation framework

Template
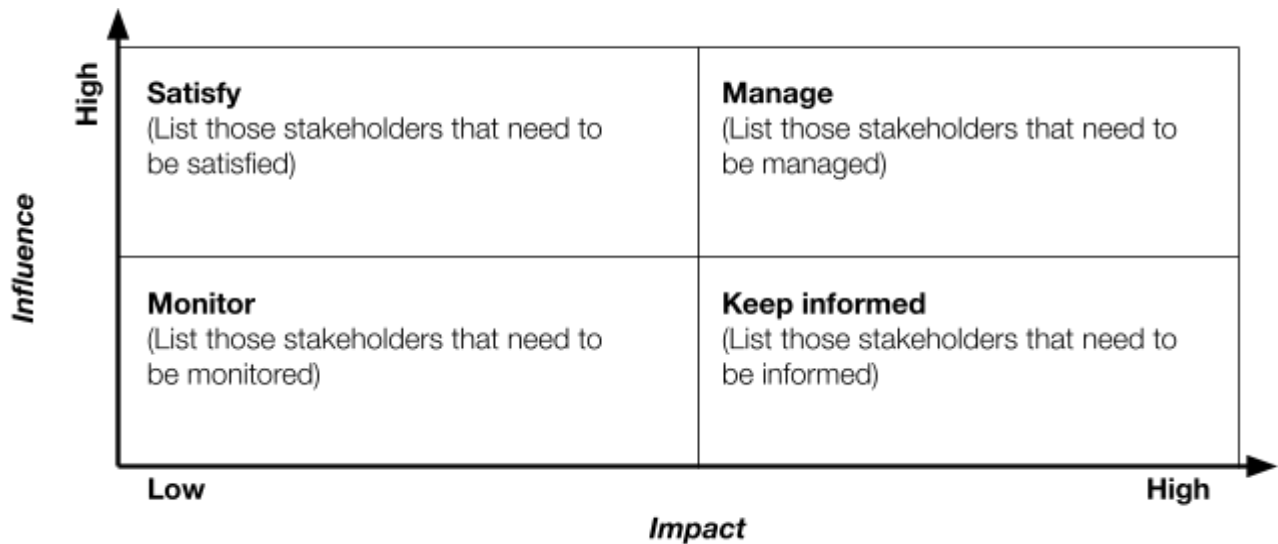
✕ Theory of change

1 Prior to drafting your theory of change, organisational staff should consider several key points to unlock funding to implement your project. This includes answering these questions during your stakeholder analysis, literature review, and experiences in the community.

Key theory of change elements	Description
Why?	What needs to change and why?
Why your organisation?	Your value proposition: the capacity for change which your organisation provides in relation to the need for change.
What?	What activities, outputs, outcomes, and impact are you aiming for?
How?	Key change mechanisms required: what will it take to move from activities to impact?
Where?	Where will change occur?

Who?	Who needs to play roles in the change process envisioned? Partners, stakeholders, etc.?
Assumptions and risks	What key context conditions are needed for change to be possible?

2 After initial research, convene a group of key targeted communities and stakeholders asking questions to test your theory of change, and learn from their perspectives on your proposed project activities.

3 Based on these answers, formulate an appropriate project intervention strategy.

💡 Tips

This theory of change approach combines a logical (if this happens, then that will happen) with a time-based perspective (what and who needs to play what role at what point?).

Questions to test your tentative theory of change

1. Are you clear what you want to achieve?

2. Do you understand how change might or will happen within the context in which you are working?

3. What strategy are you going to use to make change happen?

4. Do you have a good understanding of potential benchmarks and indicators?

✖ Problem and objective trees

1 List your problem/challenge statements to create the problem tree. Consider the challenges your proposed project seeks to address. For example:

- Families and children lack knowledge of their rights.
- Families and children lack access to modern technologies and digital literacy.

- Local communities experience high levels of poverty.
- Local communities lack access to protection from violence.
- Local communities lack access to psychosocial support mechanisms.

2 Formulate the objective tree:

- Reformulate all the negative statements of your problem to make them into positive statements that are desirable and/or realistically achievable, as shown in the example below.
- Transform cause-effect relationships in the problem tree into means-ends relationships in the objective tree.

⭐ **Examples**

Negative statement	Positive statement
Low health-seeking behaviour	Increased uptake of psychosocial healthcare
Poor reporting of domestic abuse and violence	Improved reporting of domestic abuse and violence
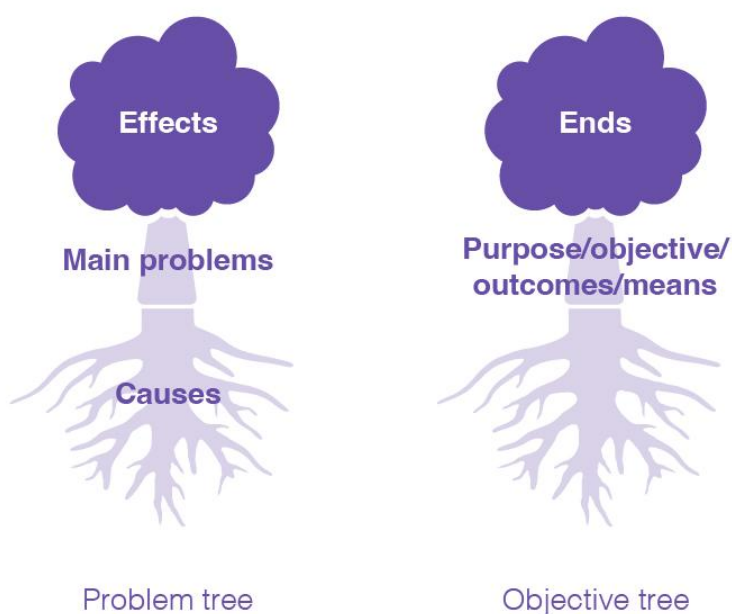
Source: Center for Civil Society and Nonprofit Management

3 Review your programme design plans. Do your problem statements align with your project activities and objectives? If not, you will need to revise the statements. Your objective tree with its programme purpose, outcomes, and objectives will be included in your logical framework.

💡 Tips

Usually, the problem tree is the starting point. However, if you are already designing your project based on an ongoing programme, it can be more effective to work backwards from your objective tree. List your project objectives. Then align them with the challenges you are encountering, and what your funding application is for. This supports justification for your project which can be integrated into your proposal.

★ Example: Problem and objective trees

In the examples given on the following pages of the problem and objective trees, you can see that first, the problem tree analysis has been developed based on the problem statement i.e., primary school children receive poor quality education. Based on the problem statement, the causes or challenges are listed below the statement and its effects are listed above the statement.

Once the problem tree has been fully developed, the objective tree is built against each of the statements in the problem tree by turning the negative statements into positive statements. For example, the problem statement is "Primary school children receive poor quality education." In the objective tree it becomes "Improve the quality of primary education." In the same way, the causes/challenges are turned into solutions and effects are turned into benefits.

Problem tree example

Objective tree example

Source: https://taxjusticetoolkit.org/tax-advocacy-strategy/step-1-identifying-problem-root-causes-finding-solution/
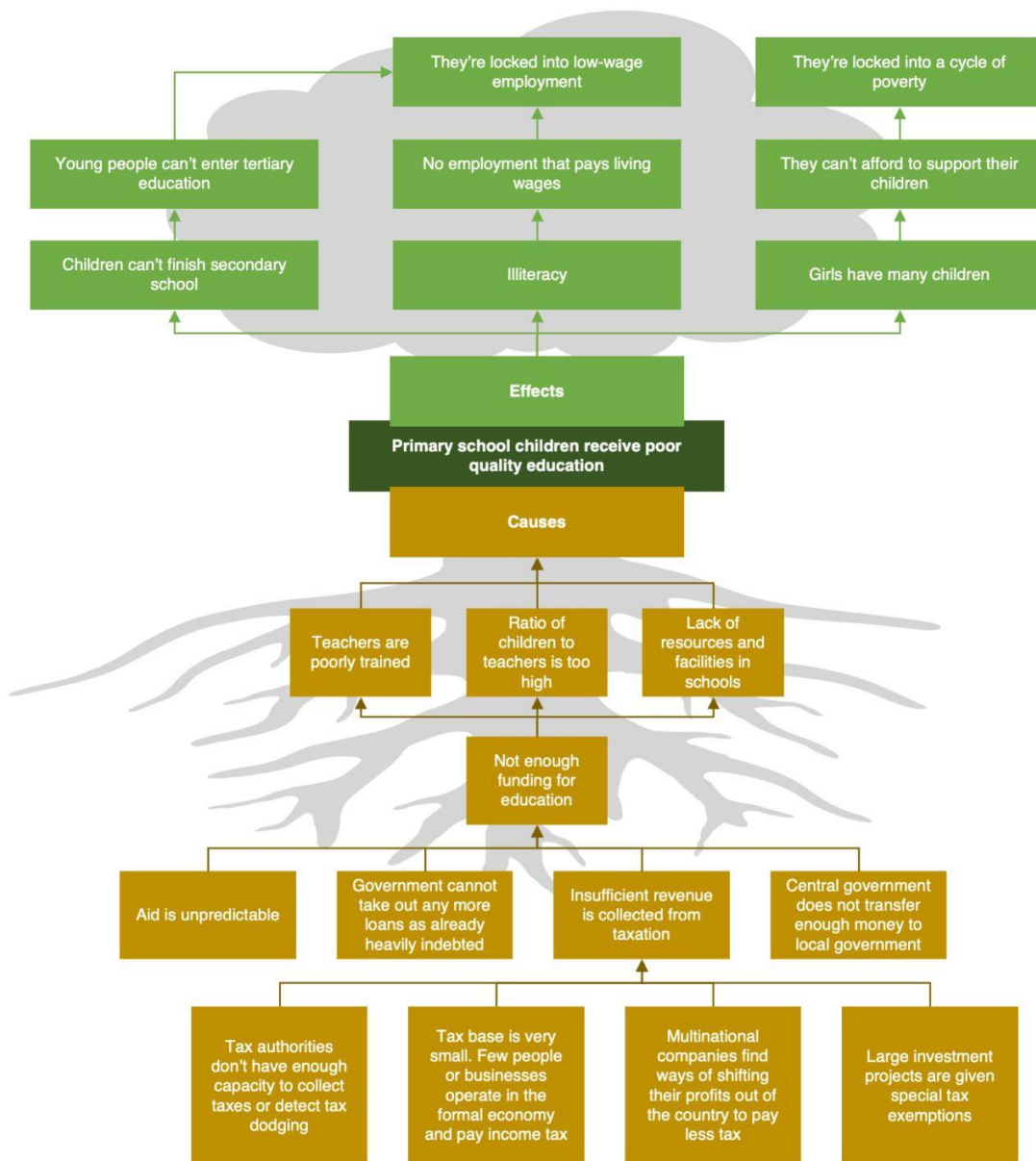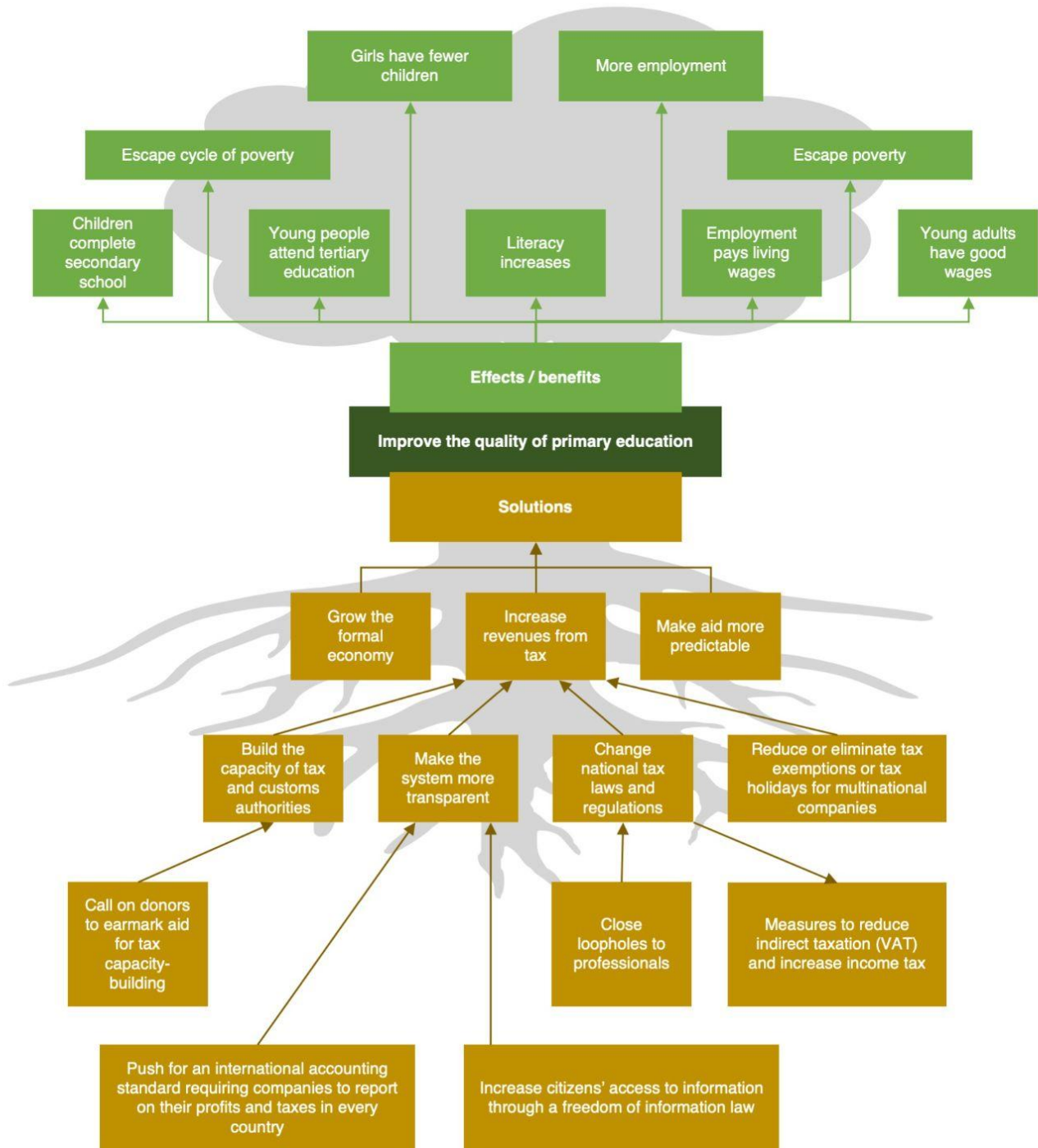
✕ Logical framework

Template

You can find a template for the logical framework here:

Logical framework template

The information about outcomes, outputs and performance indicators below should help you to formulate your logical framework.

How do you formulate an outcome statement?

An outcome statement is phrased in the past tense and should be developed as follows:

★ Examples of outcome statements

- Improved nutrition of vulnerable communities, especially women and children, in the Copperbelt Province of Zambia.
- Increased adoption of best practices by smallholder farmers in the northern region in Bangladesh.
- Increased adoption of counselling in the Ayeyarwady Region in Myanmar.

💡 Tip

Check that your outcome statement is clear, specific, measurable, realistic and achievable.

How do you formulate an output statement?

An output statement should be developed as follows:

What was delivered or rendered (for example, training, technical assistance, technology, tools) **+** In what subject (for example, best management practices, legal instruments like laws, policies, and regulations) **+** To or for whom (for example, targeted communities, government staff, women's self-help groups) **=** Output statement

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💡 **Tip**
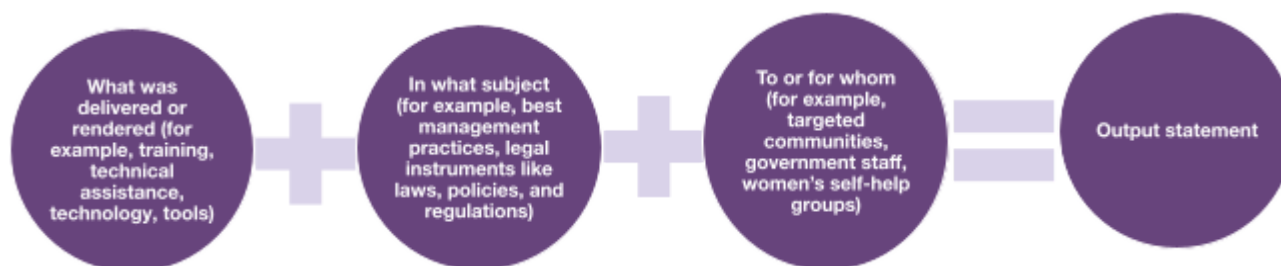
Check that your output statement is specific and detailed (although it does not cover every activity), differs from the outcome statement, outlines what the project will produce/provide, but does not indicate change and its direction (e.g. increase).

⭐ **Examples of output statements**

- Social and behaviour change communication training on seeking healthcare delivered to women-led organisations.
- Technical assistance on managing post-traumatic stress provided to children and youth.
- A cost-effective, evidence-based and participatory gender-based violence prevention mechanism will be developed for refugee and host communities.

Recommended number of outputs and outcomes

- Ultimate outcome: only one.
- Intermediate outcomes: two to three.
- Immediate outcomes: two to three per intermediate outcome.
- Outputs: two to three per immediate outcome.

> ★ **Examples of activities related to the output 'Technical assistance on managing post-traumatic stress provided to children and youth'**
>
> - Activities: Conduct needs assessment. Develop training content. Hire trainers. Deliver training.
> - Sub-activities: i.e., sub-activities for 'hire trainer' include: develop and disseminate terms of reference; review proposals; conduct interviews with those short-listed; prepare a contract.

How do you formulate performance indicators?

Performance indicators should be developed as follows:

Unit of measure + Unit of analysis + Context = Performance indicators

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> ★ **Examples of performance indicators**
>
> - Number of children screened for participation.
> - Number of parents participating in parenting classes.
> - Percentage of children receiving psychosocial support services.
> - Number of white paper downloads per month.

✕ Risk assumptions table

1 Begin by reviewing your project's logical framework and the assumptions you made regarding risks.

2 Look more carefully, assessing:

- The presence of unstable political, social, and security situations.

- Human resources challenges.

- Unexpected lack of engagement by partners, co-applicants, etc.

- Lack of engagement of private sector partners and investors.

- Partnership deteriorations.

- Less favourable market trends and economic situations.

- Environmental shocks (e.g., disease outbreaks, drought, extreme weather).

- Conflict or post-conflict situations that pose greater risks.

- Unforeseen socio-cultural constraints (e.g., women's engagement or targeted communities' engagement is more difficult to achieve than expected).

Template

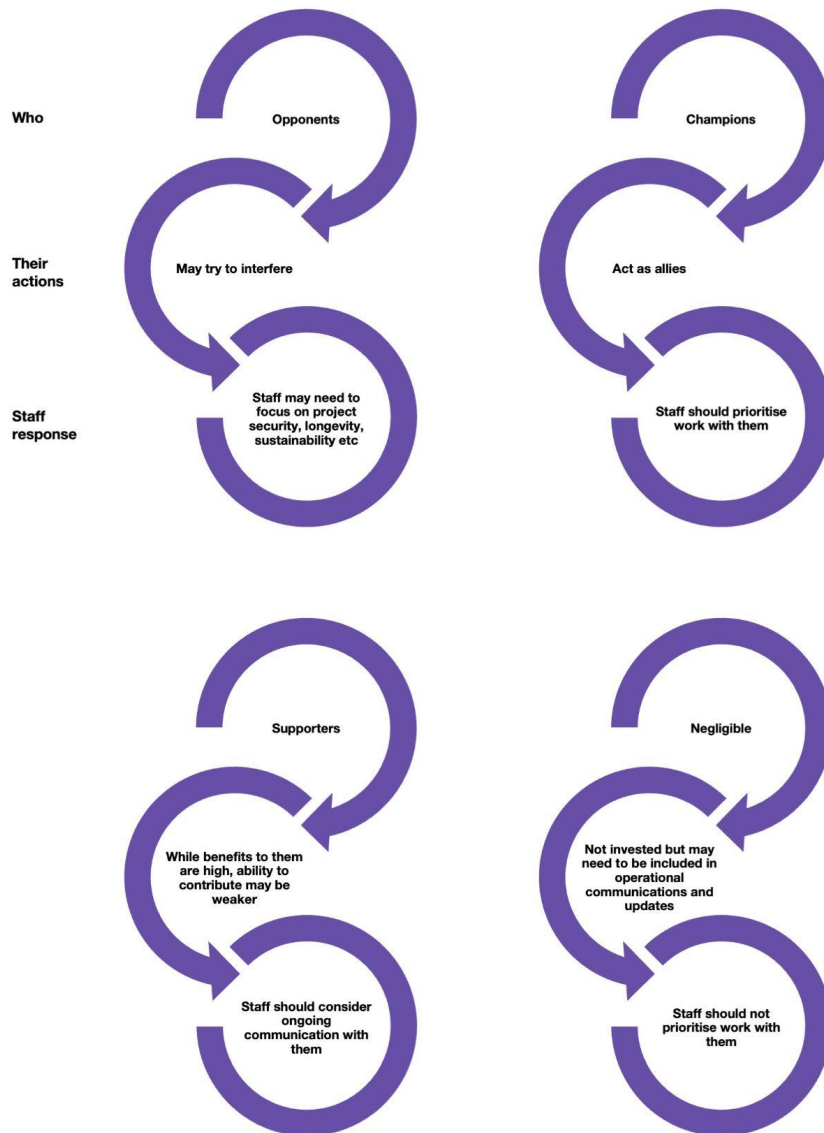| Risk assumptions table				
Activity contributing towards the project's goal	**What is assumed necessary for project success?**	High risk / Medium risk / Low risk	**Potential negative impacts on project results**	**Risk mitigation actions/plans**
Example: Work with women and girls to integrate their voices into activities.	Partners need to effectively lessen or eliminate barriers to women's and girls' participation, in a respectful, socio-culturally appropriate way.	High risk	Lack of engagement by women can lead to PMEL findings that disproportionately represent the voices of others including men, limiting the effectiveness and relevance of activities.	Partner with women-led and women-focused organisations familiar with ways to actively engage women and girls. Integrate gender into capacity building. Ensure that data collected as part of PMEL can be disaggregated by gender.

✖ Risk matrix

1 Compile a list of anticipated or potential stakeholders that your project will impact, work with, or engage in advocacy, policy, or decision-making.

2 Separate these stakeholders into the categories of 'opponents,' 'negligible,' 'champions,' and 'supporters.'

Template

Risk Matrix	
OPPONENTS *Stakeholders who are actively defensive or opposed to your project's implementation and possibly seeking to intervene in your activities.* E.g.: certain government ministries.	**CHAMPIONS** *Strongest supporters of your project and also the stakeholders generally benefitting the most from activities.* E.g.: targeted communities, local NGOs, local CSOs, local government.
NEGLIGIBLE *Stakeholders who are ambivalent to project activities, will receive no or only low-level outcomes and are, therefore, not a high priority for engagement.* E.g.: psychologists, psychiatrists, social workers, faith leaders, universities.	**SUPPORTERS** *Stakeholders in your project that may provide complementary work, expertise, and interest with few outcomes relevant to them from project activities.* E.g.: psychologists, psychiatrists, social workers, faith leaders, universities.

High interest in project (left, top row)

Low interest in project (left, bottom row)

Low benefit (bottom, left)   **High benefit** (bottom, right)

Tips: How to work with different stakeholders

Who	Opponents	Champions
Their actions	May try to interfere	Act as allies
Staff response	Staff may need to focus on project security, longevity, sustainability etc	Staff should prioritise work with them
	Supporters	Negligible
	While benefits to them are high, ability to contribute may be weaker	Not invested but may need to be included in operational communications and updates
	Staff should consider ongoing communication with them	Staff should not prioritise work with them

✖ Strengths, Weaknesses, Opportunities, and Threats analysis

1 Once you have defined the project objective, stakeholders, internal and external factors and completed your literature review, the next step would be to determine the project's strengths, weaknesses, opportunities, and threats.

💡 **Tip**

To ensure your research and assumptions are valid and applicable to your project, consult with local stakeholders.

Conduct a SWOT analysis alongside a risk mitigation analysis.

Template

Strengths	Weaknesses
- What do you do well? - What unique resources can you draw on? - What do others see as your strengths?	- What could you improve? - Where do you have fewer resources than others? - What are others likely to see as weaknesses?
Opportunities	**Threats**
- What opportunities are open to you? - What global and local trends can you take advantage of? - How can you turn your strengths into opportunities?	- What is your competition doing? - What threats do your weaknesses expose you to?

✕ Evaluation matrix template

This template can be used for considering questions related to evaluation criteria, alongside approaches to data collection and analysis.

Evaluation criteria e.g. OECD DAC Evaluation Criteria	Question i.e., overarching criteria-related question	Sub-question i.e. related to the question	Data collection source e.g. stakeholder group, targeted community group, document	Data collection method e.g. survey, key informant interview, focus group discussion, observation/site visit, document review	Approach to analysis e.g. Statistical analysis, data visualisation, thematic analysis
Effectiveness	How effective was the programme in reaching mothers?	How many mothers reached were teenage mothers?	Mothers in the village	Focus group discussion	Thematic analysis
			Attendance sheets	Document review	Data visualisation

Tools for data collection

🛠 Literature review matrix

1 Conduct a literature review of your targeted project topic, completing an entry for each source reviewed in the literature review matrix.

2 Choose a specific citation style guide (e.g., APA, MLA, AMA, Chicago Style) and remain consistent in the way you record your research information for footnotes and bibliographies.

💡 Tip

Be sure to choose reputable sources and look for those that are as up to date as possible.

Literature includes white papers, annual reports, briefs, dashboards, academic articles, blogs, and book chapters as well as programme-relevant documents such as budgets, attendance sheets, complaint records, Memorandum of Understanding, etc.

Template

Date reviewed	Reviewer	Reference	Location in your organisation's computer system	Key takeaways	Questions that arise
Date	Name	APA, MLA, AMA, Chicago Style or other style used by your organisation or the donor/funder	E.g. Google Drive, Microsoft SharePoint	Relevant points for your project, context, target community, etc.	E.g. a question to be included on a survey; a question that needs follow up from others on your team

Face-to-face data collection

1 Prior to a first visit and even before considering engaging with a community or in a context, conduct desk research, completing a stakeholder analysis and literature review to gain an initial picture of the place and the people there.

2 Generally, initial visits are with a small group of community leaders and influencers (i.e., chiefs, mayors, doctors, teachers, community health workers, farmer extension workers, and faith leaders) to introduce your organisation and the project you are interested in proposing. During this visit, document feedback and share it with your organisation to incorporate it into your approach, assuming the project will go ahead.

3 Once the project plan has been revised, hold a community-wide meeting involving these same community leaders and influencers to introduce you and the work you will be doing. This cultivates community trust as planned activities are shared, the support staff who will be involved are introduced, and the concrete project goals are outlined.

4 Move on to more targeted planning using highly participatory approaches.

5 Maintain openness and transparency across the project lifecycle. Approaches to doing this include sharing project updates, including community members in data collection and analysis, seeking and incorporating feedback from community members, and responding to complaints promptly.

6 Invest time in peer-to-peer learning, seeking advice, skills and expertise from peer organisations to foster new relationships that hopefully will develop into partnerships.

7 Remain vigilant about respecting local cultural norms as well as religious and traditional standards. This includes wearing appropriate clothing (i.e., covering up knees or wearing hijabs), using appropriate and proper language (i.e., language that is respectful to elders), avoiding taboo topics in public (although this may happen in private surveys), and respecting gendered spaces, among other things.

8 Practise the highest standards of ethics and safeguarding, as well as etiquette, addressing leaders with proper honorific titles, being polite and open with community members, learning names, etc.

Templates

Packing checklist

- Smart phone: Essential for communications, open-source survey software/applications and/or conducting and recording interviews and focus groups. If taking videos, pack a stand so you can maintain eye contact throughout interviews/focus groups.

- Tablet/laptop: Useful for programmed surveys, mapping/geotagging and notetaking. The downside is that it can come across as less personal when used in place of recorders or notebooks.

- Recording device: Traditional small devices can allow for more intimate connections and eye contact with interviewees with no loss of quality data when paper notetaking and transcription occurs at a later time.

- Extra batteries: Bring traditional and tech charging devices in case there should be a lack of available resources while working in the community.

- Notebook: Always bring a paper notebook for notetaking or ask others to write information for you, especially if resources are limited in the community where you are working.

- Map or community outline: If possible, print multiple copies of these so you can take notes on them and make observations about specific features, locations (health centres, community gathering spaces, schools, etc.) that may not be accessible online during prior research.

- Camera: To take pictures or videos of interviews, focus groups, key community locations and activities where you have informed consent to do so.

- Informed consent forms: Bring printed informed consent forms so you can discuss the importance of anonymity and interview protections with evaluation participants. You can also begin using codes to protect individual identities, saving the informed consent form for official record keeping.

- Survey forms: When you are not using smart phone/tablet surveys with individuals or households be sure to bring extra copies for your anticipated target group of targeted communities.

- Pack for weather eventualities: Consider if you will be visiting communities during rainy seasons, flood conditions, high heat or during times where diseases such as cholera/typhoid/malaria are more prevalent and pack appropriate clothing, water, sunscreen, insect spray, medicines, and other supplies accordingly.

Observation guide

Location:	Time/date:	Completed by:	Project:
Criteria	**Observation**	**Observed input/activity**	**Notes**

> **Tip**
>
> Draw from theory and programme documents to develop guidance for observing activities, facilities and practices.
>
> Be sure to think of possible conditions in which observations may be conducted and the ways this could affect data collection. For example, if teaching is actively occurring, children are working independently, or classes are not actively in session.
>
> Capture key information including geographic location (e.g., street address, coordinates), physical location (e.g., school, community centre), and the local time and date.
>
> If possible, when designing the guides, provide examples of what field workers might observe and space for additional note taking.

Survey

Various online tools, free and subscription-based, can support survey development and data collection by offering a range of question types and streamlining the compilation of data as well as subsequent analysis. Examples include:

SurveyMonkey

Google Forms

Microsoft Office

Interview/focus group

Interview/focus group protocol

The 'invitation to participate' should include:

- Introduce yourself and the purpose of the interview/focus group.

- Mention how long the interview/focus group will last.

- Present any compensation or provisions (e.g., transportation reimbursement) to be offered.

- Provide logistical information (date, time, place).

- Highlight to whom questions should be directed to and how to reach that person.

Your interview/focus group script should:

- Introduce yourself and the purpose of the interview/focus group.

- Outline how the data collected will be used and presented and how participants can be part of those presentations.

- Remind participants that they may end the session at any point.

- Encourage participants to ask questions.

- Confirm consent to record (if applicable).

- Offer any guidelines for maximising participation (e.g., speak one at a time).

- Thank participants before ending the session.

- Remind them who to contact and how to reach that person if they need to follow up.

- Remind you to review and upload notes daily.

Templates

Record of interviewees/focus group participants

No.	Participant name	Role/ position	Organisation	Stakeholder group	Contact info	Interview date/time	Location /link	Interviewers

Data form

Date, time:	Location:
Interviewer name:	Interviewer name:
Participant:	Role/organisation or stakeholder group:
Consent to participate documented: yes/no	Consent to record granted: yes/no
Question:	Notes:

Spider tool

This tool is designed to engage children and youth in a focus group setting. It supports children, youth and adults in:

- Assessing children's initiatives/organisations according to several core criteria.

- Assessing goals, strengths and areas of improvement.

- Reflecting on the learning process that takes place as children, young people and adults collaborate on initiatives.

- Feeding findings from assessments into planning and into the improvement of organisations and projects.

This tool engages children and youth in identifying key quality elements and relevant indicators and enables them to lead on the assessments, while adults record learnings as to what their role going forward should be and ethical considerations that need to be addressed.

The spider tool can be used with fairly new children's groups, informal groups of children and with more established children's organisations as well as with adult-initiated groups that are aiming to become more child-led. It promotes reflection on whether children or adults are more influential in agenda setting and how partnerships between adults and children can be cultivated.

In diverse contexts, piloting of this tool indicated that it was most effective when used by children representing a single child-led organisation or a few child-led organisations. Because of the levels of reflection, dialogue and action planning involved, 10 to 20 participants should ideally be involved at a time, preferably over a few days, with facilitation by an adult familiar with the child-led organisations or a child facilitator.

Workshop

Template

Workshop report template

Steps

- Conduct a needs assessment before planning for the workshop.

- Utilise the needs assessment findings to draft objectives and key messages.

- Finalise the participants, team and facilitators who will be part of the PMEL process.

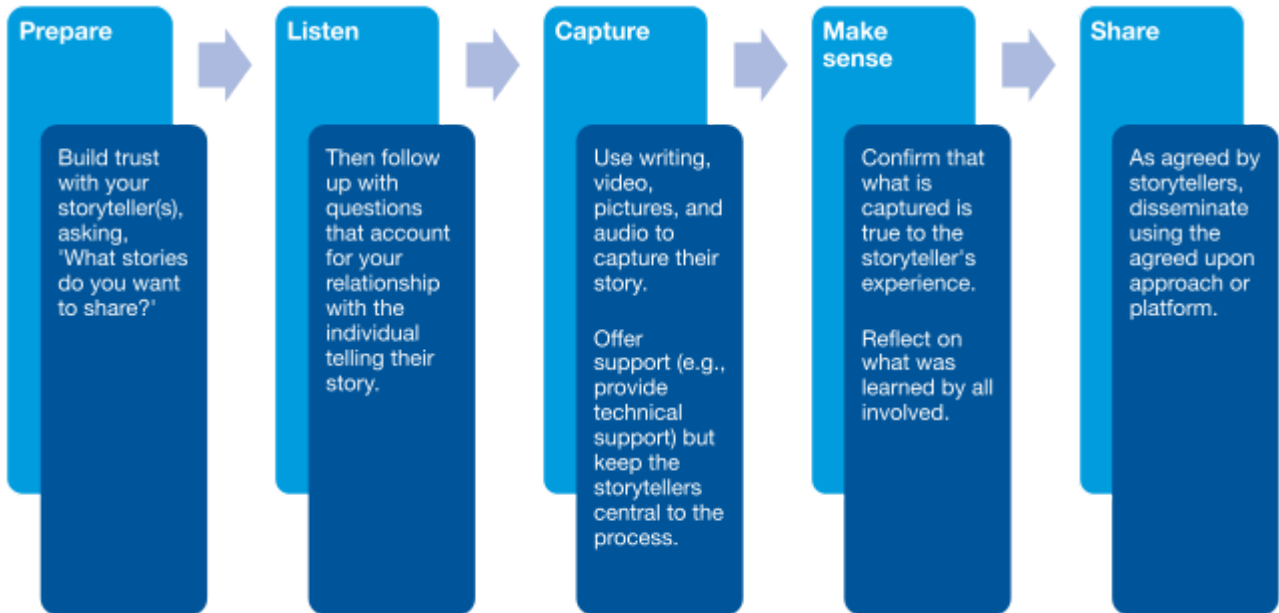- Define the workshop objectives, finalise the venue and date, and prepare the agenda.

- Review PMEL resources, data and relevant materials that would support PMEL workshop objectives.

- Plan the sessions with activities, then develop speaking notes for facilitators.

- Prepare discussion questions to facilitate the PMEL data collection process, findings, and results.

- Develop the workshop evaluation.

- In alignment with the agenda, facilitate the workshop online/offline.

- Summarise the workshop findings, takeaways, and next steps.

- Disseminate the workshop evaluation to collect feedback on the workshop from the participants.

- Prepare a workshop report (template link given above) and share with stakeholders.

- Follow up with participants and the team regarding the next steps, findings, and workshop outcomes.

- Conduct a follow-up workshop if necessary.

Storytelling

Steps

Prepare	Listen	Capture	Make sense	Share
Build trust with your storyteller(s), asking, 'What stories do you want to share?'	Then follow up with questions that account for your relationship with the individual telling their story.	Use writing, video, pictures, and audio to capture their story. Offer support (e.g., provide technical support) but keep the storytellers central to the process.	Confirm that what is captured is true to the storyteller's experience. Reflect on what was learned by all involved.	As agreed by storytellers, disseminate using the agreed upon approach or platform.

Note: Draws from Copeland, S. and de Moor, A. (2018) Community digital storytelling for collective intelligence: towards a storytelling cycle of trust. *AI and Society*, 33, p. 101 –111.

Resource

Dignified storytelling **PRINCIPLES**

1 IT'S NOT MY STORY.

2 I DO NO HARM.

3 WE ARE ALL MULTI-DIMENSIONAL.

4 CONSENT IS MORE THAN PAPERWORK.

5 I AM BIASED. (REPEAT)

6 I DO MY HOMEWORK.

7 I AM EMPATHETIC.

8 I PROTECT OTHERS' DATA LIKE IT'S MY OWN.

9 TRUTH OVER HEADLINES.

10 A STORY CAN CHANGE THE WORLD.

The above principles are taken from the Dignified Storytelling Champions' Toolkit.

⚒ Diaries/journals

1 Determine what information you need to collect to measure progress towards your project goals. Remember not to collect more data than you can process and analyse as this is a waste of resources.

2 Identify who will be targeted for data collection and how many participants you need, balancing this with resources to provide support, train participants, collect diaries, and distribute materials, etc.

3 Identify who will provide additional support, train participants, collect diaries, distribute materials, etc.

4 Design the format, keeping in mind participant needs and the focus of entries.

5 Circulate an invitation to participate in person, using posters, posting on social media, or disseminating through partners. Incorporate considerations for invitations shared in interviews/focus groups.

6 Train participants to complete entries and distribute materials. Incorporate considerations for protocols shared in interviews/focus groups.

7 Follow up on questions and restock materials as needed throughout.

8 Facilitate a workshop to thank participants, gather feedback on the tool, and share key takeaways and the ways these findings will be used in their communities.

Template

A picture diary is a record of what you have experienced over a period of time. The entries in the diary depict what happened, when and where, as well as opinions and emotions. Picture diaries are very relatable and informative for the viewer/reader. They give both visual input and verbal descriptions that provide context to data collection.

Picture diary		
e.g. pictures of products or services	🙂	☹️

⚒ Outcome harvesting

For detailed information on planning your outcome harvesting model, see Family for Every Child's outcome harvesting manual.

Family for Every Child: Outcome harvesting manual

1 Design the outcome harvest by determining the questions to guide the harvest based on how the harvest will be used.

2 Gather data, draft outcome statements, and connect these statements to your project.

3 Engage change agents in formulating outcome descriptions.

4 Substantiate and collect stakeholder feedback and evidence on outcomes.

5 Analyse and interpret.

6 Use learning and support findings for monitoring, reflection, increasing understanding of changes in real time, and to intentionally inform interventions.

Note: Draws from Family for Every Child Outcome harvesting manual and ReliefWeb (2021) Outcome harvesting: Best practices for learning & reflection.
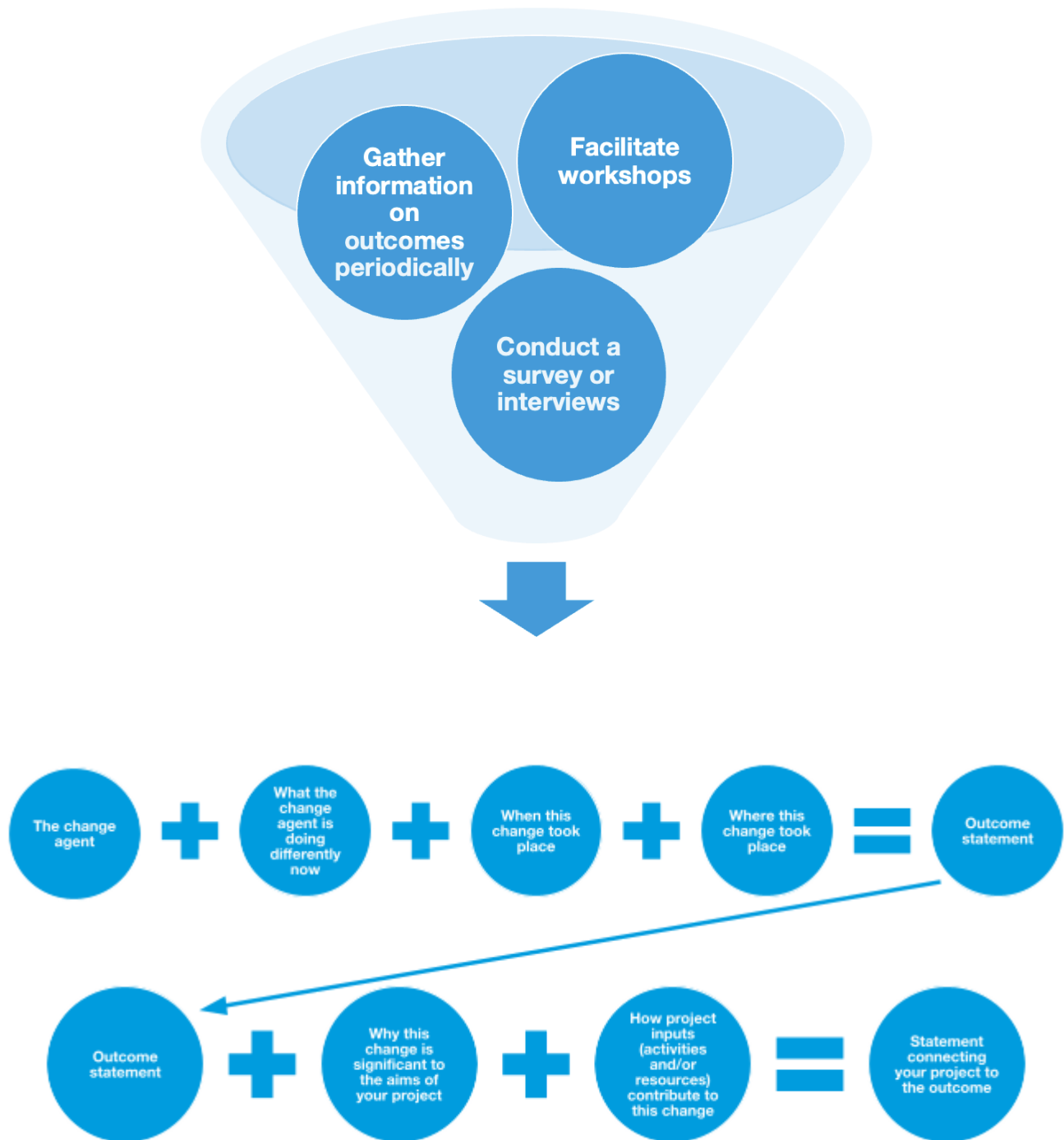https://reliefweb.int/report/world/outcome-harvesting-best-practices-learning-reflection

💡 Tips

Participants in designing the scope of the outcome harvest should be harvest users and harvesters.

In parallel to designing the scope, design your tool for capturing outcomes.

Approach to drafting statements connecting your project to outcomes

The change agent + What the change agent is doing differently now + When this change took place + Where this change took place = Outcome statement

Outcome statement + Why this change is significant to the aims of your project + How project inputs (activities and/or resources) contribute to this change = Statement connecting your project to the outcome

Note: Draws from World Bank Document which also offers additional Tools for Harvesting Outcomes, Tools for Substantiating Outcomes, and Tools for Interpreting and Monitoring Outcomes. World Bank (2014) *Outcome-based learning field guide*. Washington D.C.: World Bank.

Annex 1: Additional resources to support PMEL

Templates

Monitoring plan

A monitoring plan describes how your organisation's whole PMEL system works or is laid out. It is presented in a table and tracks data that needs to be collected for project indicators, methods to be used, frequency of collection, source of data, and the individuals responsible.

Sample monitoring plan template

Monitoring strategy

A monitoring strategy provides a template to outline all elements that need to be considered for robust monitoring that supports learning and feeds into your participatory evaluation of practice.

Sample monitoring strategy guide

Annual monitoring report

This report documents and communicates the results of your PMEL to the appropriate stakeholders annually. It includes a summary of your project as well as updates on its progress and achievements, activities undertaken, inputs, money disbursed, outputs, indicators, results, impacts, challenges and recommendations from the interventions during the year.

Sample annual monitoring report template

'Analysing M&E data' from MEASURE Evaluation's *A guide to monitoring and evaluating adolescent reproductive health programs*.

This guide includes templates for comparing actual performance with targets and standards, analysing changes to programme indicators over time, and comparing the performance of various sites.

Chapter 8: Analyzing M&E data

Annex 2: CSO case studies

The following case studies provide examples of how Family for Every Child member CSOs have implemented some of the elements which contribute to effective PMEL. If you would like to learn more from Family for Every Child members about their experience with tools highlighted in the case studies below, please contact **practiceexchange@familyforeverychild.org.**

★ Case study: Home inventory through interviews

JUCONI, in Mexico, uses a home inventory to capture the dynamics that a family follows to protect and care for children and adolescents. It uses a semi-structured interview approach in the home, where most family dynamics take place, reconstructing a day's routine using questions on elements that contribute to development, depending on the age and conditions of each child and adolescent.

★ Case studies: Media for focus group discussions

CINDI, in South Africa, used the South-African film Yesterday to initiate discussions about HIV and caregiver-child relationships and child rights. Media such as photographs can be captured by participants as part of data collection. With just some brief instructions by CINDI staff on how to use a camera and compose a picture, children were able to take cameras back to their communities to document children's rights being upheld as well as instances where they were not being upheld. The children shared their photographs, describing them in their own words. The photographs were then printed, labelled and displayed.

JUCONI, in México, uses video to allow early childhood caregivers to reflect on their interactions in a free play environment, through video snippets. Using a guided approach, caregivers are able to identify positive effects on their children's emotional and cognitive development, receive encouragement, and listen as other caregivers share their experiences. JUCONI also uses video as a training tool for employees, using video snippets of their successful interactions with children, adolescents, young people and caregivers to identify, recognise and reflect on good practices. JUCONI notes that regularly using their video approach has enabled skills development among the

staff, leading to accreditation as supervisors, as well as among educators, leading to endorsements of their skills and certification as guides.

★ Focus: Digital strategies

Digital strategies for work with children during COVID-19
Contributed by Family for Every Child member ONG Paicabí, Chile

NGO Paicabí is a non-profit development institution with the mission to advocate for, protect and defend children under the framework of the International Convention on the Rights of the Child. NGO Paicabí addresses the most serious violations of rights affecting boys and girls and works to establish a platform for action against mistreatment, sexual abuse, social exclusion and commercial sexual exploitation. NGO Paicabí carries out specialised interventions in the field of children's rights and generates knowledge through incorporating local art and culture.

In the challenging psychosocial intervention context of COVID-19, NGO Paicabí pioneered remote working techniques to continue its work. The organisation's 'Voces y Colores' (Voices and Colours) captured such work by professionals from across NGO Paicabí who contributed to 11 reflective intervention projects that included child-sensitive tools for remote work.

★ Focus: Child-led approaches

Networking for children's rights and child participation
Contributed by Family for Every Child member CINDI, South Africa

Children in Distress (CINDI) is a multi-sectoral network of 200+ civil society organisations capable of implementing diverse, effective and sustainable programmes for children and youth infected or affected by HIV and AIDS in the KwaZulu-Natal province of South Africa.

Its Child Participation Project was launched to empower children and ultimately engage them in child-led action and advocacy work and was highly successful in energising children to actively engage in bettering themselves and their communities. Its proposed pathway to impact is shown on the following page.
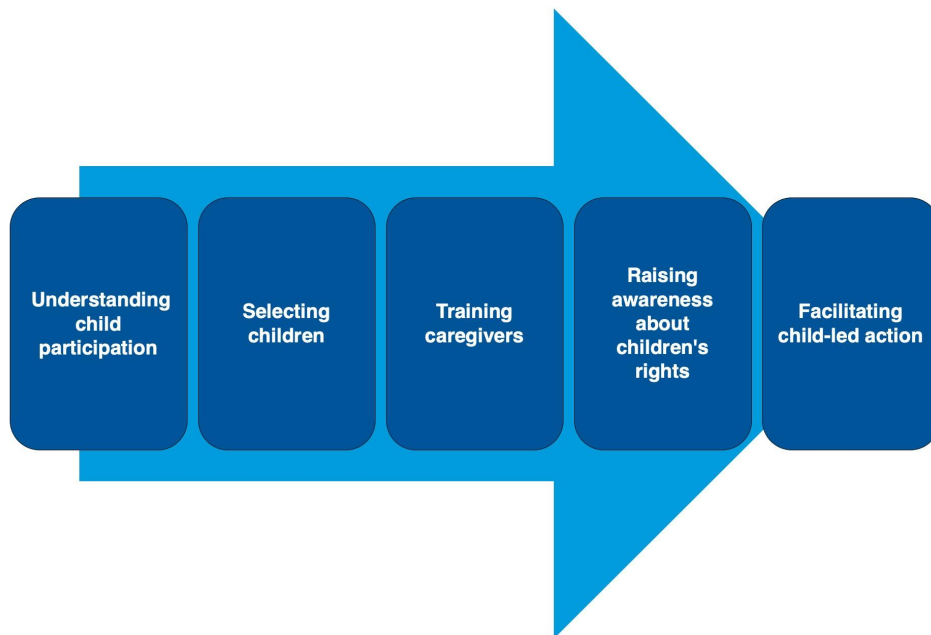
The project specifically aimed to overcome barriers to child participation. These can include children being uninformed or not included when projects are managed by adults, or their activities being token, rather than, core activities.

CINDI recommended training both children and caregivers in parallel so that while children were engaged on the project, parents and guardians did not feel left out, become distrustful or develop negative feelings about the project. CINDI accomplished this by facilitating trainings with both children and caregivers on topics such as:

- Human dignity.

- Best interests of the child.

- Principles of inclusion.

- Formal address on children's rights including legal aspects of realising these rights.

- Circles of support.

- Creation of safety nets and strengthened circles of support.

- Child protection and how it can address children's rights.

- A child-friendly society.

In preparation, children engaged in workshops that included games and creative projects. One such activity was a photo-documentary project in which groups of children were provided with a camera to document their lives and challenged to capture where children's rights were and were not being met in their communities. Also, imbizos, events where children led discussions using their own creative ideas (e.g., songs, poetry, drama), were held to engage directly with government officials. These events empowered children in their own advocacy. For example, children performed dramas for government officials on government corruption and presented officials as slow and negligent in addressing serious children's rights violations.

Through this work, several key considerations for success emerged:

- Design activities to be fun and active with time for reflection and sharing.

- Facilitate in a way that is fun and respectful.

- Incorporate art.

- Listen to child-participants and integrate what they advocate.

Resource

CINDI: *Networking for Children Affected by AIDS. Networking for children's rights and child participation*.
https://www.cindi.org.za/images/Networking_for_Childrens_Rights_and_Child_Participation.pdf

<div>⭐ Focus: Document review</div>

Using videos and photos in PMEL
Contributed by Family for Every Child Member Centre for Services and Information on Disability (CSID)

Bangladesh-based CSID focuses on three core areas: information and resource sharing and networking; research; and community-based support services. Through its work, CSID found that only 4 per cent of children with disabilities had any access to the education system. In addition, children with disabilities had little access to services, including special education services. Reasons identified included discrimination within communities and within children's own families, coupled with neglect from authorities in enforcing current policies.

Thus, between 2008 to 2009, CSID ran a participatory project titled 'Art Walk for Education and Social Inclusion of Children with Disabilities' with the goal of creating an inclusive, barrier-free, child protective society where children with disabilities live with equal opportunity, dignity and rights.

The one-year project included numerous activities. At its conclusion, CSID conducted an evaluation group which included document review, in-depth interviews and focus group discussions with targeted communities and stakeholders in order to assess the achievement of project goals and formulate a set of recommendations to guide the project's next phase. Among the documents reviewed were videos and photos, recognised as potentially very important sources of insights as this project was focused on theatre, music, and the arts, including performances by the children involved.

Resource

Centre for Services and Information on Disability (CSID) *Art walk for education and social inclusion of children with disabilities.*

★ Focus: Child-led approaches

Child-led research
Contributed by Family for Every Child Member Challenging Heights

Challenging Heights, a non-governmental organisation based in Winneba, Central Region, Ghana, focuses on supporting children's rights, especially their right to education, and the prevention of child labour and child trafficking, particularly in the fishing industry. In 2007, the organisation established a school in an impoverished area of Winneba where child trafficking was occurring, enrolling students who are survivors of child trafficking or at-risk of child trafficking. Between 2011 and 2012 there was an increase in teenage pregnancy. As part of the organisation's research initiative Participate, a child-led approach was used to conduct research in relation to the rise in teenage pregnancy, with the child-researchers enrolled at the Challenging Heights School.

The 14 child-researchers were engaged across the project phases including:

- Prioritising potential research topics.

- Designing the methodology.

- Interviewing peers at the school using a semi-structured approach.

- Analysing interview notes.

- Presenting the research.

- Developing case studies.

- Identifying recommendations and next steps.

Two important considerations emerged from this approach:

- Finding the right balance between child-led and adult-guided, particularly on a topic as sensitive as teenage pregnancy and with numerous concerns around 'Do No Harm'.

- Distinguishing between the attitudes of participants and facts and presenting this distinction accurately.

You can read and download this toolkit via our Changemakers for Children community platform. Via that platform you will also be able to engage in discussion about evaluation approaches with fellow practitioners from around the world, including the organisations referred to in this toolkit.

Please register to join Family for Every Child's Changemakers for Children community at www.changemakersforchildren.community.

You can also find out more about the work we do at www.familyforeverychild.org.