



MONITORING, EVALUATION, RESEARCH AND LEARNING POLICY

A SUB-POLICY OF THE PROGRAMME AND INFLUENCE QUALITY POLICY

1. Purpose

The purpose of this policy is to support robust and credible monitoring, evaluation, research and learning (MERL) practices across all Plan International programme and influence work. This policy articulates the importance of MERL to the organisation, defines each of the four components and outlines the approach that Plan International will take. It complements the Programme and Influence Quality Policy (PIQP) and Programme and Influence Approach (PIA).

This policy is supported by a set of global [MERL Standards](#) that outline our quality expectations for each MERL component.

2. Application

This policy applies to all work that is undertaken by all Plan International offices under the global Programme and Influence Quality Policy, from which it is derived.

Plan International recognises that there are broad sets of responsibilities linked to MERL and these are outlined in an [Accountability and Responsibility Framework](#). It is important to note that MERL is the responsibility of multiple functions across the organisation, and this policy should not be read as being only applicable to the work of MERL staff.

3. Timeframe

This policy is effective from the date of approval: November 2018.

4. Review

This document shall be reviewed 2 years from the date of approval, with a view to update and improve the policy.

5. Rationale

Plan International strives for a just world that advances children's rights and equality for girls. Monitoring, evaluation, research and learning (MERL) are all vital to our ambition to support 100 million girls to be able to learn, lead, decide and thrive. In particular MERL underpins Plan International's delivery of effective and accountable gender transformative programmes and influencing, as outlined in our global strategy.

Plan International recognises that the four components of MERL serve different purposes and require a variety of approaches, yet we see them as interconnected and mutually reinforcing.

Plan International believes that MERL is useful and drives learning to improve the quality of our programming, informs decision making by providing evidence to support our programme



and influence priorities, and helps strengthen other actors' abilities to contribute. As Plan International strengthens its position as an influencing organisation, there is an increased need for good quality MERL of influencing work, from local to global levels.

Good quality MERL is an integral part of the development and humanitarian process itself, by supporting children, families and communities and other key stakeholders to articulate their views, analyse their experiences and build up their confidence to take action. The people we work with have the direct experience of the results of our work and on the issues effecting their communities and we will systematically engage with them to explore how we can improve the work and achieve more.

Plan International will use the evidence and learning that is generated from quality MERL to help improve the effectiveness and efficiency of our operating model and to support the mobilisation of resources.

6. Principles

Plan international is committed to ensuring that MERL is gender transformative

Gender transformative objectives, practices, and methodologies must be integrated into MERL work so that this thinking can be mainstreamed across all stages of longer term programmes, shorter project cycles and investigative studies that seek to underpin programming and influencing.

Plan International is committed to the implementation of high quality MERL for Results Based Management (RBM).

Plan International appropriately resources rigorous, relevant and high quality MERL on all our programming and influencing work using the results to inform decision making and continuous improvement at project, programme and strategy level. To do so, Plan International ensures that all relevant staff have the appropriate MERL competencies, in line with the MERL Competency Framework.

Plan International is inclusive and accountable to programme participants, donors, and partners.

Plan International includes programme participants, donors and partners in MERL practices in a meaningful way. We recognise that MERL must drive greater efficiency in programme and influence work. This requires all offices within the organisation to recognise an integrative approach, that promotes participation, avoids duplication, harmonises practices and builds broad collective ownership and support for MERL that minimises cost and time.

Plan International is transparent and honest.

Being open and accountable is one of our core values and underpins our MERL practices. Plan International is working towards full compliance with the International Aid Transparency Initiative (IATI) and will provide the systems and supporting environment whereby country office data will be available for reporting against the IATI Standards.

7. Monitoring

Plan International defines monitoring as a continuing process that involves systematic collection and analysis of data, including feedback from stakeholders, to provide management and the main stakeholders of an ongoing intervention with relevant information



about the extent of progress and achievement of objectives, quality of approaches and relationships, as well as progress in the use of allocated funds.

Data generated through monitoring activities is systematically and periodically analysed and learnings identified. Specific actions to improve how we design and implement our programming and influencing work are identified and implemented.

Plan International staff, across different functions, monitor the following in all programme and influence work:

- Processes: the quality of how we implement our interventions
- Outputs: the immediate results of our activities
- Outcomes: specific changes among target groups, stakeholders and institutions
- Finances: the full cost of both project delivery and the required support

8. Evaluation

Plan International defines evaluation as an in-depth assessment of an on-going or completed project, programme or policy, covering its design, implementation and results. Evaluations include analysis of both qualitative and quantitative data and incorporate feedback from key stakeholders.

Plan International's evaluations include assessments of:

- Effectiveness: the extent to which, and the reasons behind, the achievement (or not) of the project or programme's objectives, and whether these are leading to unintended (positive or negative) consequences for anybody involved or affected by the interventions.
- Sustainability: the *probability* of continued long-term benefits to the target populations after the project or programme has been completed.
- Relevance: the extent to which the interventions and their approaches were suited to the priorities and policies of the people and communities they were intended to benefit.
- Efficiency: the extent to which financial resources were used economically and efficiently
- Child rights, gender and inclusion: the extent to which the project or programme applied gender and inclusion sensitive approaches and explicitly aimed for results that improve the rights of children and young people and gender equality.

In some specific cases, it will be appropriate to conduct impact evaluations to establish causal attribution to any observed positive and negative, primary and secondary long-term effects observed. However, due to the complexity and cost of such evaluations, this will require the appropriate level of planning and resourcing.

9. Research

Plan International defines research as original investigation, undertaken in order to gain knowledge and understanding about issues critical for Plan International's programme and influencing priorities, through the use of qualitative and quantitative research methodologies.¹

¹ Adapted from the *Code of Practice for Research*, UK Research Integrity Office, 2009.



At Plan International, we conduct research on topics which:

- have been identified as a knowledge gap related to Plan International's programming and/or influencing priorities and/or country strategies
- reflect Plan International's broader ambitions around child rights, inclusion and gender transformative programming and influencing
- provide relevant, up-to-date information and analysis that contributes to strengthen the knowledge in the sector and in the country or region of implementation.

10. Learning

Plan International defines learning as an ongoing and continuous process of reflection and critical thinking with the purpose of developing new or modifying existing knowledge, attitudes, skills and practices.

Learning processes should draw on data collected from monitoring, evaluation and research initiatives, as well as the experiences and information that exist among those involved.