

NASCEE Monitoring, Evaluation and Learning Series

Developing a Reporting Framework: Clarifying Stakeholder Needs + Data Collection and Reporting Mechanisms

23 March 2023



Illustration by Storyset (Freepik)





Hello!

I am Zinhle Mkhabela.

I am a senior MERL Specialist and Associate Director of the MERL practice at Data Innovators (DI).

I am driven by my curiosity and, broadly, I am currently applying myself to questions about the intersections of gender, race, education and development.

I am passionate about doing work with meaning and, in the day-to-day, I apply my multi-disciplinary background to support organisations and teams to develop knowledge and learning systems, which support evidence-informed programme intervention, design, and implementation.

AGENDA

#	Item	Duration
1	Introduction	5 mins
2	Framing the Discussion: The Function of MERL and Planning as a Critical Tool for Performance Improvement	10 mins
3	Deep Dive: Mapping Data Collection and Reporting Processes	30 mins
4	Reflection and Discussion	10 mins
5	Closing	5 mins

FRAMING THE DISCUSSION

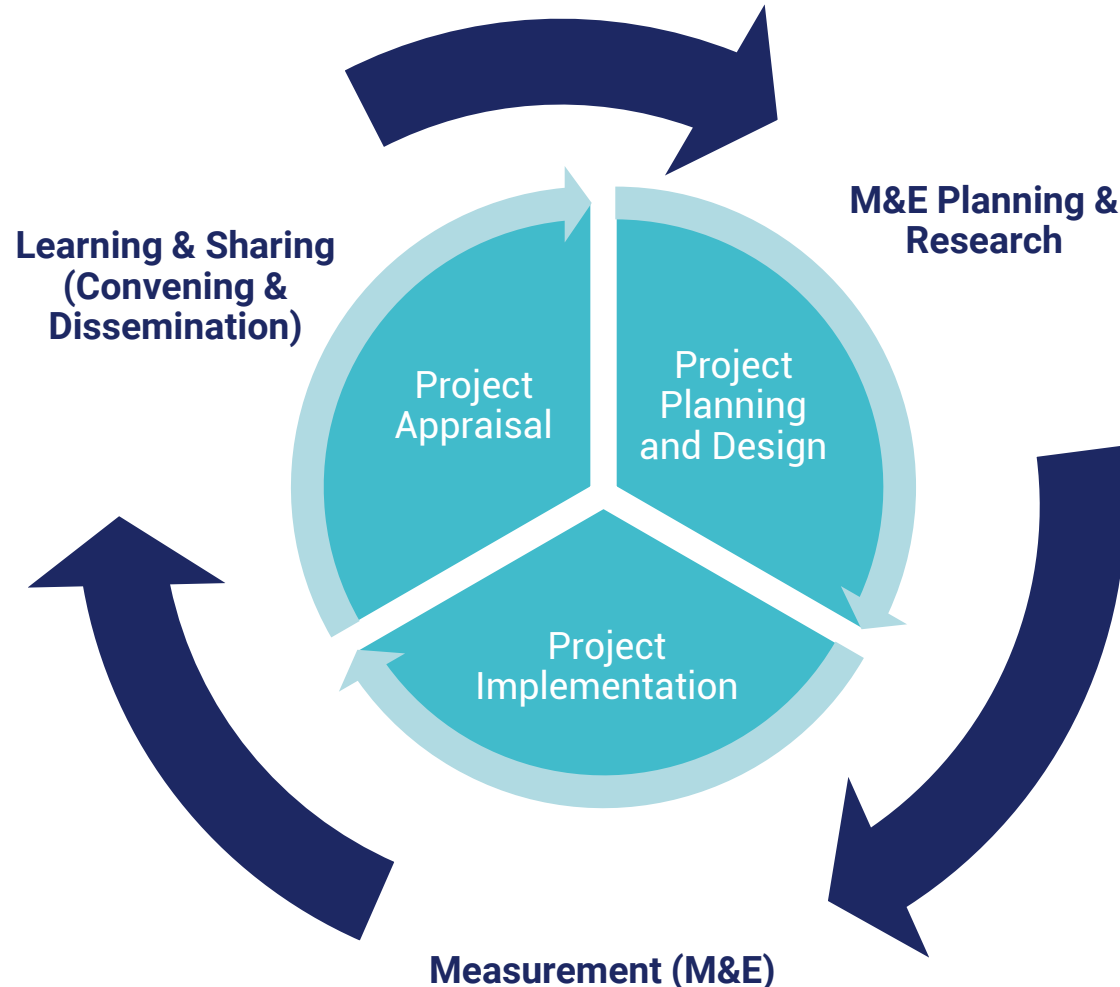
**The Function of MERL and Planning as a Critical
Tool for Performance Improvement**

THE FUNCTION OF MERL W/IN A PROGRAMME/PROJECT CONTEXT

Multipurpose MERL

- 1 Inform the programme theory
- 2 Measure programme progress; and
- 3 Facilitate learning
- 4 Enhance accountability
- 5 Celebrate wins
- 6 Improve sustainability

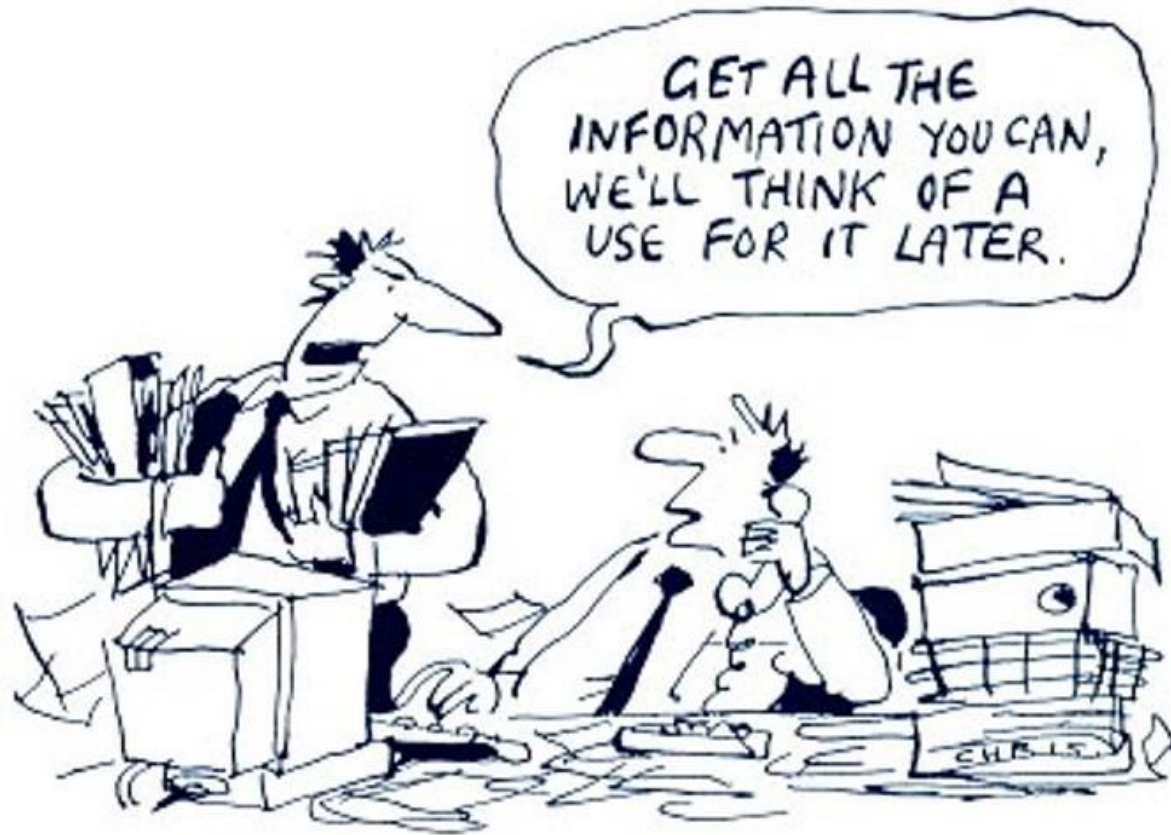
MERL Cycle and Activity Areas



The MERL Cycle is Aligned to Programme Activities

- MERL forms an integral part of all stages of a programme's life-cycle i.e. of programme design, implementation and completion.
- MERL activities therefore occur within all these stages and are typically aligned with programme activities.
- In addition, elements of the MERL cycle and activity areas are not discrete. They often overlap with and inform one another.

THE PURPOSE OF DEVELOPING A CLEAR PLAN FOR MERL IMPLEMENTATION



Source: DevPolicy Blog, 2018

- As a function of good programme management and improved performance, MERL systems require strong planning. The purpose of the MERL Plan is to:
 - clarify what activities the M&E team intends to carry out;
 - explain the rationale and process of carrying out MERL activities;
 - clarify team roles and responsibilities;
 - ensure adequate resourcing for MERL;
 - ensure documentation of any decisions regarding the MERL; and
 - support adaptive management

THE DIFFERENT COMPONENTS OF A MERL PLAN

1 Theory of Change

2 LogFrame/Logic Model

3 Data Collection and Reporting Processes (Today's Focus)

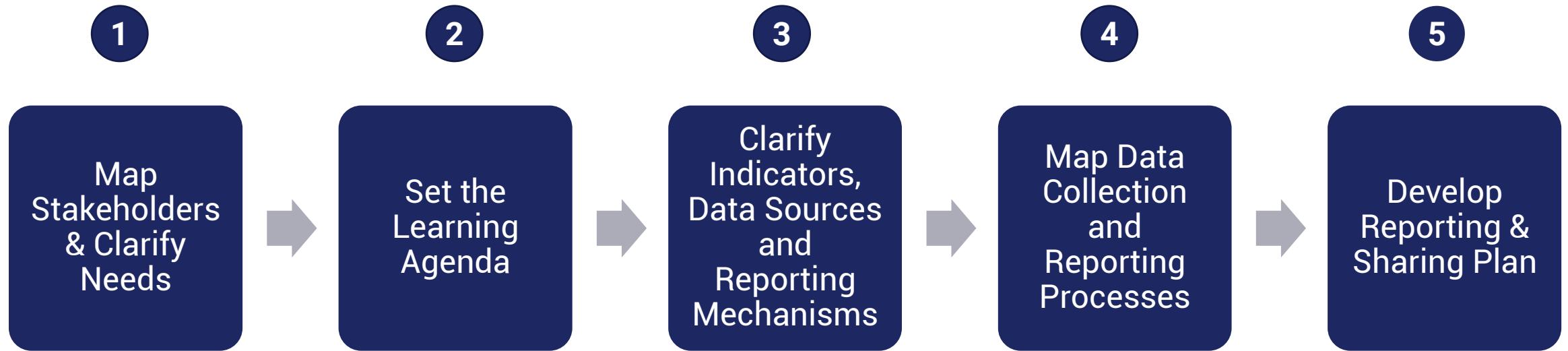
4 MERL Workplan/Calendar & Activities



A DEEP DIVE: MAPPING DATA COLLECTION AND REPORTING PROCESSES

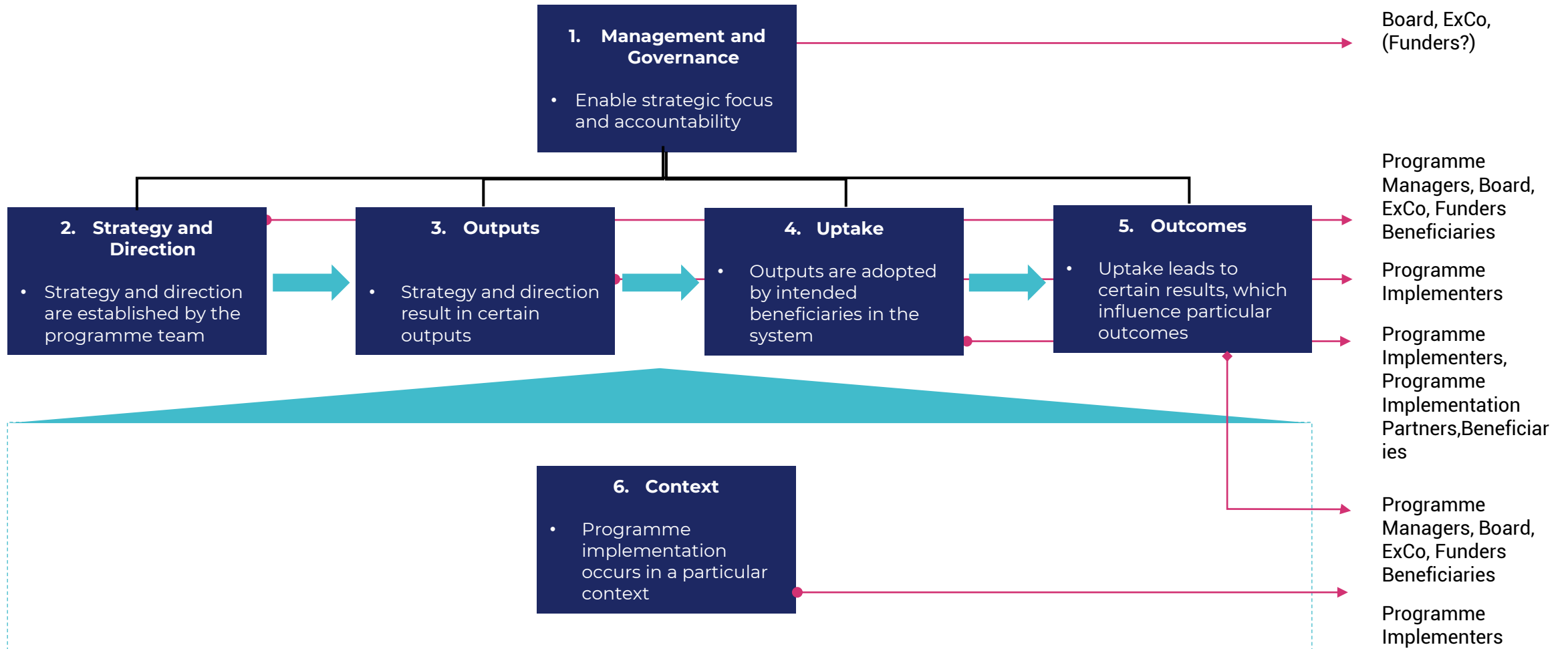
Process Steps and Key Considerations

PROCESS OVERVIEW



MAP STAKEHOLDERS & CLARIFY THEIR MERL NEEDS

You can use the six strategic areas of MERL to map stakeholders and their MERL needs according to their roles and driving questions



SET A LEARNING AGENDA BASED ON WHAT YOUR STAKEHOLDERS CARE ABOUT

1. Management and Governance

1. Is the funding model for the programme appropriate?
2. Are the programme partnership and coordination arrangements effective?
3. Is communication effective across key stakeholders?
4. Are all strategic stakeholder adequately engaged/participating?
5. Are programme plans being implemented as effectively as possible?

2. Strategy and Direction

1. Are the set of teacher/learner interventions appropriate for developing 21CC, as defined?
2. Are there significant contextual factors/shifts that will influence programme efficacy?

3. Outputs

1. Are programme outputs audience appropriate?
2. Do programme outputs meet required standards?

SET A LEARNING AGENDA BASED ON WHAT YOUR STAKEHOLDERS CARE ABOUT

4. Uptake

1. Are targeted stakeholders accessing the intervention?
2. Are education managers adopting and enabling active learning pedagogies?
3. Are teachers applying acquired active learning pedagogies and methods independently?
4. Is the programme adequately sharing lessons?

5. Outcomes and Impact

1. Does teacher training influence teaching and learning in the classroom?
2. What contextual factors determine teacher and learner behavioural changes?
3. To what extent do active learning pedagogies contribute to developing 21CC?
4. To what extent does embedding active learning pedagogies have an effect on institutionalisation?
5. What forms of learning partnerships are necessary to foster active learning pedagogies in schools?
6. How do learning partnerships contribute to developing active learning pedagogies?

6. Context

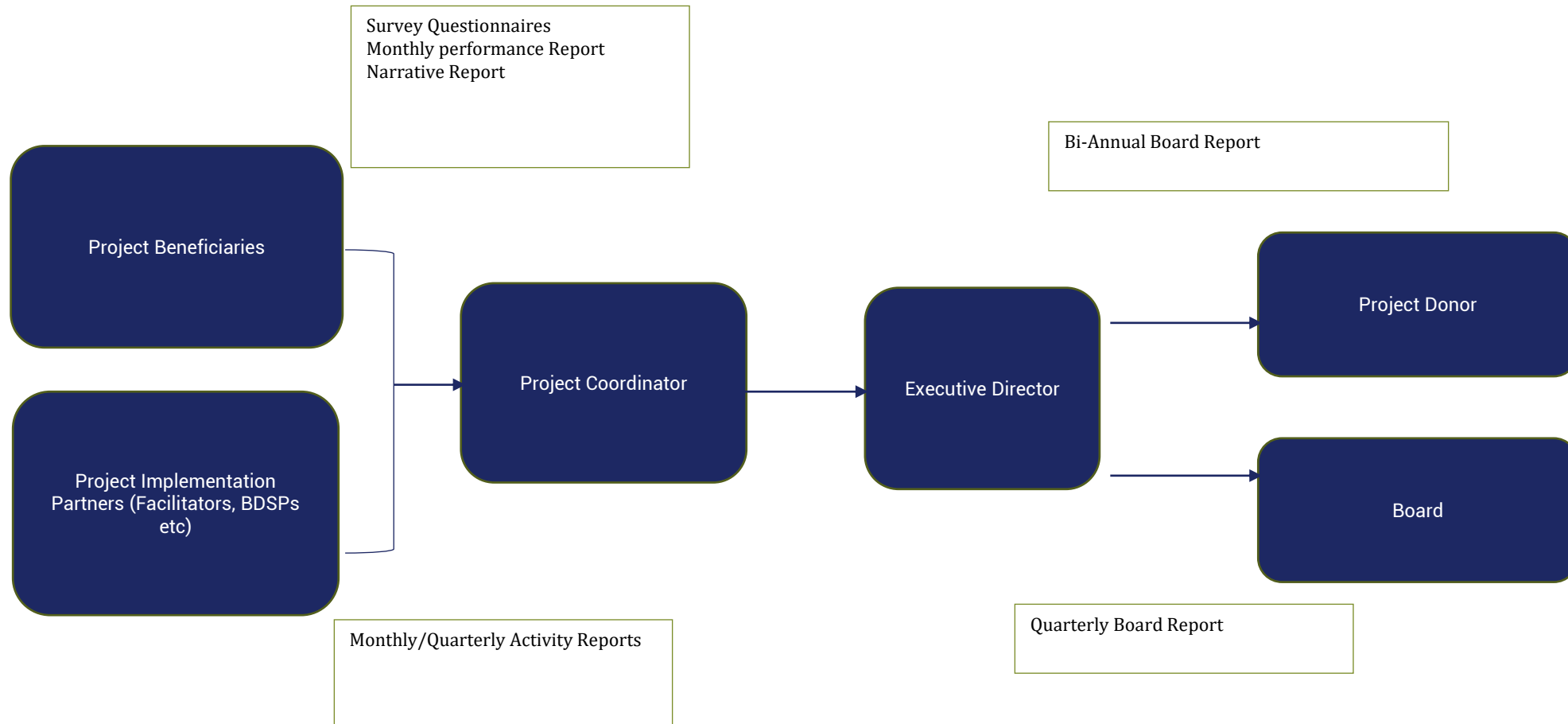
1. How does the changing political, economic, social and institutional environment affect programme plans and intended outcomes?

CLARIFY INDICATORS, DATA SOURCES AND MECHANISMS FOR REPORTING

	Result as per ToC	Learning Question	Indicator	Data Source	Reporting Frequency	Reporting Mechanism	By Whom
Goal	Systemic institutionalisation of PBL as a method to activate learners' 21CC	Are the set of advocacy mechanisms appropriate for ensuring increased institutionalization of PBL	existence of institutional framework (mandate, procedure or unit) to support PBL across the DBE	DBE policy announcements, DBE annual report	Annually	Annual Evaluation Report	External Evaluators
Outcomes	Increased % of teachers with improved knowledge and understanding of PBL Increased % of teachers who use PBL effectively in the classroom	To what extent are teachers displaying shifts in behaviour and mindset, which align with PBL and facilitating learning for 21CC?	# of teachers reporting/demonstrating that they can use PBL effectively in the classroom	Teacher survey	Quarterly	Quarterly Board Reports	Programme Managers
Outputs	Teachers trained in PBL methodologies	Is the teacher training engaging for teachers?	# of teachers who complete the training	Online teacher training platform data	Monthly	Monthly Monitoring Reports	Programme Implementing Partners
Activities	Designing training Delivering training						
Inputs	Trainers Training facilities Budget						

MAP DATA COLLECTION AND REPORTING PROCESSES

EXCERPT FOR ILLUSTRATION PURPOSES



DEVELOP REPORTING AND SHARING PLAN

EXCERPT FOR ILLUSTRATION PURPOSES

Stakeholder	Type of Report	Description	Time & Frequency	Consideration
From Beneficiaries to Programme	Narrative Report	<p>Overview of benefits the enterprises have gained from programme training in terms of capacity building and how these benefits will be used as tools in the long term.</p> <p>This report outlines the success and challenges and timelines for their activities, how often were the meetings held, elaborate how supportive and useful was the support.</p>	Once towards the end of the support	Desired process. First narrative report will be completed June-July
Monthly Progress Report (Currently Non-Existent)	Provides detail about how far beneficiaries have gone towards the completion of the project. It outlines the activities carried out, the tasks completed, and the milestones reached vis-à-vis project plan.	Once: At the end of every month	This report should not be cumbersome. It should be very brief and comprehensive.	



REFLECTION AND DISCUSSION

RESOURCES

1. [Better Evaluation, Theory of Change Guide, 2014](#)
2. [Hivos ToC Guidelines, A Stepwise Approach, 2015](#) (Good example of ToC development that takes power dynamics into consideration)
3. [BetterEvaluation, LogFrame Guide](#)
4. [USAID RELISIM-O MERL Framework, 2017](#) (Good example of a MERL Framework/Plan which takes into consideration complex systems – includes data collection and reporting processes)
5. [USAID LEARN Learning Plan, 2018](#) (Another example of a MERL Framework/MERL Plan – includes data collection/reporting processes)
6. [BetterEvaluation Stakeholder Mapping and Analysis Tool](#) (A different example of how you might map MERL stakeholders/different categories of MERL users)

Thank you!

You can connect with me at zinhle@datainnovators.co | [linkedin.com/in/zinhlemkhabela/](https://www.linkedin.com/in/zinhlemkhabela/)