WOMEN FOR WOMEN INTERNATIONAL
MONITORING, EVALUATION, RESEARCH AND LEARNING (MERL)
STRATEGY 2016-2020

After more than 20 years of on-the-ground experience implementing a holistic 12-month program that provides critical skills, knowledge and resources that enable the social and economic empowerment of marginalized women in conflict-affected areas, Women for Women International (WfWI) is at an important strategic and programmatic crossroad. There is growing recognition of the value of rigorous monitoring, research and evaluation to demonstrate, learn, and improve on program results, and an acknowledgement of the benefits of using these results and lessons to contribute to global policy debates and influence decision-makers.

WfWI strives to evolve into a learning organization that uses rigorous monitoring, research and evaluation to guide key programmatic and organizational decisions, as well as to advocate for evidence-based policy and practice. In order to do that, WfWI plans to strengthen its monitoring systems, incorporate research and evaluation as key pillars of its operations, and establish clear mechanisms for organizational learning.[1]

OBJECTIVES & GUIDING PRINCIPLES

The purpose of this document is to strategically and systematically direct the organization's monitoring and learning activities and its engagement in research and evaluation activities. These activities are aligned with the organization's strategic priorities in the following manner:

- By incorporating monitoring and learning into all program activities, we will be able to build and draw upon a rich set of evidence, insight and best practice to design and implement effective program initiatives. This is in direct alignment with the organization's strategic priority to **"deliver an expanded program model that includes a broader range of tools and services"** and **"expand our work."**

- By conducting research and evaluations, we will be able to better understand the socio-economic realities of the marginalized women we serve as well as measure the impact of our program on their lives. Rigorous evaluations will also help us to identify whether and through which mechanisms our influence can be considered a contribution or a direct attribution for specific target outcomes. This is in alignment with the organization's strategic priority to **"evidence our impact, strengthen accountability to stakeholders, and learn, apply and leverage knowledge and expertise to improve programs"** and **"evolve and build a legacy."**

- Evidence and insights from our MERL activities will provide the basis for our policy work, ensuring that our messages and recommendations are based on robust data and analysis. Sharing lessons and results internally and externally will enable us to establish thought leadership and contribute to the wider literature. This is in alignment with the organization's strategic priority to **"build a global strategy and approach to influencing policy."**

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[1] A list of terms and definitions used in monitoring, research and evaluation are provided in Annex A. This list will serve as a common foundation for WfWI's research and evaluation discussion and activities.

More specifically, the <u>objectives</u> of WfWI's MERL activities are:
1. To first and foremost ensure **accountability** to the women we serve and to the communities where we work in conflict-affected countries, through soliciting feedback and input and direct sharing of MERL results, and indirectly through the implementation of maximally effective programs.
2. To **inform and continuously improve our theory of change, program model, and program design**; to increase effectiveness and efficiency.
3. To **build WfWI MERL capacity globally;** to create an organizational culture invested in learning and improving, and committed to transparency and accountability.
4. To **promote research and evidence-based decision-making**; to direct funds to program initiatives that have greater impact.
5. To share insights and lessons across the organization and among allies; to engage with key influencers, whether donors or policymakers, and **provide field experience and thought leadership** on the issues of policy importance to the women we serve.
6. To contribute towards **filling the global data gap** on women's specific and differential experiences and outcomes.

In pursuing the above objectives, we are guided by the following core <u>principles</u>:
1. We amplify the voices and needs of the women we serve internationally.
2. We invest financial and human resources in monitoring, research and evaluation.
3. We place a high value on participant data as a critical and precious organizational resource.
4. We are self-critical and objective in how we evaluate components of WfWI programs and seek to continuously and iteratively improve program effectiveness and cost-effectiveness.
5. We adopt a scientific approach in our learning, with a focus on rigorous methods and replicability of results.
6. We share monitoring, research and evaluation results to promote learning and accountability, especially to the women we serve.
7. We value humility, integrity and excellence in all aspects of our work.

TIMELINE

While the activities in the strategy will be rolled out between 2016 and 2020, the development of this MERL strategy has been informed by the following key activities undertaken in the 2013-2015 period:
1. WfWI conducted a Research and Evaluation Seminar in Washington D.C. in November 2013, bringing together a diverse group of experts to seek guidance on Priority Areas that we envision focusing on over the coming years.
2. Prior to the seminar, two background papers were developed in 2013 on the evidence around women's economic empowerment and men's engagement (*see supporting documents*). The background papers served as a foundation for the organization's thinking behind the Priority Areas, and were shared with seminar participants. *Note: These background papers will be updated in 2017 to ensure that our strategy is aligned with evolving trends in the literature.*
3. The research and evaluation strategies of other organizations were reviewed in 2013 to inform content and framing of the current strategy.
4. WfWI's participation in the 'Goldilocks' project on 'right-fit M&E systems' run by Innovations for Poverty Action in 2014-2015, clarified the strengths and areas for improvement in the organization's current M&E approach (case report available here).

5. Inputs from ongoing conversations and discussions with staff from the Country Offices, WfWI UK, and within Headquarters fed into this strategy document in the 2014-2016 period. The current document was discussed with M&E Managers from all country offices at the global Programs/MRE workshop held in Kigali in June 2016.

CATEGORIES OF MONITORING, EVALUATION & RESEARCH ACTIVITIES

Our work under MERL encompasses a wide spectrum of organizational activities that together provide the breadth and depth required for continuous learning through multiple methods, processes and tools. In this section, we provide a high-level overview of these categories of activities and strategic priorities for the 2016-2020 period within each category.

(A) MONITORING

Over the years, WfWI has developed an extensive infrastructure for collecting and using participant-level data at various stages of the program (*see supporting document describing the organization's Monitoring Tools & Process Revisions as of August 2013*). In this document, we highlight the most important monitoring activities and the priority improvements included in the current MERL strategy.

Community-level assessments of women's status, needs and market conditions. After a community has been identified as eligible for program intervention (determined by country and headquarters program leadership using set criteria), WfWI undertakes systematic community assessment exercises, one on women's status and needs and another on local markets. The assessments place an emphasis on understanding the specific social and economic needs of women in the identified community. WfWI staff collect information, opinions, and challenges directly from women in order to develop a community-focused approach on the issues discussed in the WfWI program, as well as to establish a baseline pre-intervention view of women's status, needs and outcomes. On average, WfWI works within a community for 3 to 5 years or until the program has served most of the eligible women. In the current MERL strategy, WfWI expects to systematize the reporting of community and market assessments in order for them to contribute to understanding participant outcomes, while also exploring the possibility of a community re-assessment five years after WfWI has established a programming presence to determine changes in the community (including any possible spillovers on non-participants) post-program intervention.

Collecting participant data. WfWI's current global monitoring system for tracking participant-level inputs, outputs and outcomes was established in 2009. A number of key priorities for improvement were identified in 2013 (*see supporting document describing the organization's Monitoring Tools & Process Revisions as of August 2013*), which laid the foundation for the following priority changes in monitoring that will continue to be highlighted under this MERL strategy:
- Streamlining and standardizing the monitoring of **inputs and outputs** for all core and complementary programs undertaken by WfWI, including through the development of new approaches to enter program input and output data into the existing electronic database.
- Strengthening the monitoring of participant **characteristics and outcomes**, including through the revision of indicators, tools and processes used to collect data from participants at enrollment and graduation and from graduates one and two years post-graduation.
- Including the systematic collection of **qualitative data** as part of our monitoring process using various tools.

- Shift to **electronic data collection** for all core and complementary data collection in the organization to improve data quality and efficiency. This shift has been completed in 2014-16 for the core women's holistic training program, and is underway for complementary programs.
- Shift to **sampling data collection methods** for participant outcome data, to reduce the survey load in field offices and ensure high-quality and statistically representative results. This shift has been completed in 2014-16 for the core women's holistic training program, and is beginning for complementary programs.
- Clear and current guidance provided for all monitoring activities in the country offices through a systematic update to the **M&E Field Manual** (last updated in 2012) used to guide all M&E activities, including guidance on use of survey tools and electronic data collection.

Analyzing and reporting on participant data. Accompanying the changes listed above on our approach to collecting participant data, we expect to continue to invest in enhancing and strengthening our analysis of the large volumes of data we collect. The priorities for how data are compiled, analyzed and reported include the following:
- All participant data will be aggregated in **central secure electronic databases** that are housed at the organization's headquarters.
- The development of an **analytical dashboard tool** that allows various stakeholders, including M&E, Program and leadership staff at country offices, the UK office, and headquarters to view and receive intelligence from the aggregated participant database in a secure and efficient manner is an organizational priority under the current MERL strategy.
- Participant data will be processed and analyzed to provide results and insights from **two complementary perspectives each year**: (i) output and outcome data for participants who graduated from WfWI programs in the most recently concluded calendar year, and (ii) follow-up outcome data collected upto two years post-graduation for women who completed the WfWI program from past periods to understand the sustained well-being of past program graduates.
- **Thresholds** will be established for key participant output and outcome data per country office against which progress from each of the above analyses will be assessed. These country results assessments will be conducted once annually, typically in Q2-Q3 of each calendar year to inform operational planning for the following calendar year in Q3-Q4. A key goal of the current MERL strategy is to ensure that all planning is based on a careful review of program results.

Experiential learning. The international development community has increasingly realized the need for a middle ground between monitoring project activities and outputs and conducting intensive rigorous impact evaluation at the end of a program or project.[2] Experiential learning is a systematic effort to integrate an iterative learning process into the program by designing activities in such a way to allow for comparison of different approaches to achieve the same objectives. WfWI plans to incorporate experiential learning into program design and development, and in program implementation. In practical terms, this means the involvement of the M&E team in proposal development and program design discussions, as the incorporation of experiential learning will influence the direction of program activities.

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[2] Lant Pritchett, Salimah Samji, and Jeffrey Hammer. 2013. "It's All About MeE: Using Structured Experiential Learning ("e") to Crawl the Design Space." CGD Working Paper 322. Washington, DC: Center for Global Development.

Examples of experiential learning:
(A) In trying to understand the potential impact of asset transfers at graduation, such as start-up kits to women, the program can be designed to roll out in phases where the first phase would involve implementing start-up kits for a certain group of women only. Results from the first phase comparing women who received start-up kits versus women who did not can then inform the second phase of the program. Additional questions regarding the mode of delivery or magnitude of asset transfers can be incorporated into the second phase design as well.
(B) Another example of experiential learning would be to test vocational training pilot programs in which alternative models of vocational training design and delivery are tested to assess comparative effectiveness – e.g. varying components such as number of hours of vocational training, follow-up visits, and start-up capital.

Monitoring through partners and affiliates. Under the 2017-2019 organizational strategic plan, the goals of innovating to expand our program offerings (sometimes through partnerships with local or specialist program implementing agencies), expanding our work to respond to crises in new areas, and evolving our model to create affiliate local organizations in locations where peace is sustained, all require expanding the boundaries of our monitoring systems beyond our own field office locations. We expect to pilot processes of co-designing and co-implementing M&E protocols and activities with partners and affiliates under this MERL strategy. Best practice from these trials will be consolidated into a guidance note by the end of the current organizational strategic plan on how we approach monitoring tasks when we work through partners and affiliates, how various MERL roles and responsibilities are best distributed between WfWI and partners, and how we aggregate and report results from our own monitoring data combined with data collected through partners and affiliates.

Data quality assurance. We expect to initiate select protocols and processes to further strengthen our data quality assurance across all field locations, beyond the systematic quality and validity checks built into our Electronic Data Collection systems. These could include data backcheck exercises, replication of analyses, or external reviews of data management processes.

Note on costs. *An important aspect of our monitoring work in the current MERL strategy is to ensure that the budgetary needs for the effective monitoring of programs, and for robust data collection and analysis are adequately estimated in project proposals submitted to donors. The grants teams at WfWI will continue to work closely with MERL staff at headquarters and in the country offices to ensure that the costs of all monitoring activities are carefully estimated and included in proposals from the design and inception phase.*

(B) EVALUATION

Process and program evaluation. With operations spanning six active country offices, WfWI conducts internal process and program evaluations periodically to assess the quality, consistency, and relevance of program implementation according to established program guidelines and curriculum. Information gathered through such evaluations serves as a solid foundation to build programmatic improvements, and subsequent research projects, project assessments, and impact evaluations (see Sidebar).

Project evaluation. WfWI conducts individual project-level evaluations to fulfill our requirements on grants from government agencies, private foundations, and major donors. In many cases, these project evaluations are sponsored by the donor.

Rigorous impact evaluation. In addition to ongoing monitoring activities, WfWI plans to **conduct at least two rigorous impact evaluations with randomized designs** in one or more of the priority areas as part of the current MERL strategy. In this endeavor, we plan to partner with research and donor institutions that can provide technical and financial support to effectively evaluate the causal impact of our programs.

In the case of all major evaluations undertaken, WfWI management will prepare a response that lays out how the findings of the evaluation are interpreted by the organization and our plans to systematically address accepted recommendations (*please see section on 'Learning from Monitoring, Research and Evaluation' on p11 that provides additional detail on this component*).

(C) RESEARCH

Research papers. Research projects will be developed to answer specific questions in our three priority research areas. These projects will use a variety of research methods, from qualitative ethnographic approaches to large-scale statistical analyses, to answer key open questions in gender equality and poverty alleviation in conflict-affected settings. Research activities will be commissioned that can satisfy objectives around both program development and policy influence. In some cases, it may be necessary to commission research that is primarily designed to contribute to policy influence,

however all research will be based on our program work and will use appropriate methods to explore a given topic of interest

Literature reviews. In addition, we hope to periodically conduct and write up literature reviews on key topics that can inform program design and development discussions. Previous literature reviews have been developed in the areas of Women's Entrepreneurship; Financial Inclusion; Access to Health; and Men's Engagement. These topics will be revisited to update the literature reviews and have them serve as living reference documents. New topics that emerge as priorities for programmatic work will also be explored.

PRIORITY AREAS FOR RESEARCH & EVALUATION

WfWI has identified three Priority Areas on which we intend to focus our research and evaluation efforts over the 2016-2020 period. These themes are based on emerging questions about the 12-month empowerment program, current and historical complementary programs that WfWI has implemented, as well as based on growing interest in the impact that WfWI's work has on gender equality and poverty alleviation.

(A) Women's Agency

There is limited evidence to date showcasing changing dynamics of decision-making and power within households and communities following interventions that promote women's agency in conflict-affected settings. While gender theory provides us with numerous frameworks for defining the roles of various individuals within any given social, economic, cultural or political structure, there is very little empirical research related to the way collective decisions are made by male and female members of the household or the community in the context of an intervention aimed at improving women's agency and decision-making. Crucially, there is currently limited understanding of the incentives and trade-offs at play between decision-makers in the household, as well as at the community-level.

The World Bank's Voice and Agency report (2014) defines agency as "the capacity to make decisions about one's own life and act on them to achieve a desired outcome, free of violence, retribution, or fear." Expressions of agency include: control over resources; ability to move freely; decision-making over family formation (marriage, numbers and spacing of children, divorce); freedom from the risk of violence; and ability to have a voice in society and influence policy.

Research questions in this priority area are likely to include the following:
- How are economic and social decisions made in the household in the absence of interventions targeting women's agency?
- What do roles and responsibilities and power dynamics look like in environments of conflict in the household, and in the community?
- How do greater economic opportunities and access to resources affect agency, bargaining power and decision-making roles in the household, and in the community?
- How are investment decisions made with greater input from women qualitatively different from decisions made in the absence of input from women in the household, and in the community?

- What are the risks (such as violence) associated with women asserting themselves in decision-making in the household, and in the community?
- How does the core program affect the prevalence of violence against women?
- If advocacy is a key mechanism for expressing collective agency, what are the challenges that marginalized women face in participating in advocacy in communities affected by conflict (structural, institutional, familial, etc.)?

Recent research and evaluation projects under Women's Agency (completed, ongoing, and forthcoming):
- Qualitative research on women's access to land in DRC (2014; funded by Millby foundation grant).
- Evaluating the impact of WfWI's 12-month integrated program on reducing the prevalence of violence against women in Afghanistan (2015-2018, funded by DFID through the 'What Works to Prevent Violence' global research program).
- Qualitative study of marginalized women's pathways to advocacy in conflict-affected communities in DRC and Nigeria (2016, funded by Millby foundation grant).
- Evaluating the impact of improving women's agency and participation in decision-making on household economic and social outcomes in DRC (2017-2020, funded by FLOW grant).

(B) Women's Economic Empowerment

WfWI's monitoring data collected on a cohort of graduates shows that women's income increased gradually and more importantly, is sustained over the course of three years. At enrollment into the program, women reported earning an average of $9.48 a month, which increased to $26.64 a month (excluding the monthly $10 stipend) at graduation, and $53.75 per month at 24 months post-graduation[3]. However, more than half of our graduates still earn less than $1.25 per day (52%) and most are engaged in subsistence-level agriculture and petty trade, income sources that fluctuate across seasons and are vulnerable to external shocks. Qualitative and anecdotal data also reveal a minority of graduates that have demonstrated impressive entrepreneurial skills despite limited resources. They are the savvy business-owners in the community.

Emerging evidence shows the impact of complementary packages that deliver a combination of 1) life skills, vocational, and/or business skills training, 2) cash or asset transfers, not unlike WfWI's program, and 3) group structures for cooperative economic activities. However, questions remain regarding the most effective delivery and design of complementary packages, and how it can best accelerate marginalized women's ability to pursue occupations of their choice and earn an income.

As a step toward WfWI's goals to 1) improve the economic outcomes of ultra-poor women, and to 2) better support and facilitate entrepreneurship among business-minded women, we are keen on conducting an impact evaluation of WfWI's 12-month empowerment program on women's economic and social outcomes to allow us to benchmark the effectiveness of our program and potential mechanisms/drivers of the observed impact. This planned impact evaluation that focuses specifically on women's economic empowerment would require new fundraising and the development of new research partnerships.

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[3] This longitudinal data analysis tracks a set of 2,574 participants who graduated from Women for Women International's social and economic empowerment program between October 2011 and July 2012, representing approximately 9% of all graduates from this period.

In addition to conducting this rigorous impact evaluation, WfWI is also interested in answering key questions related to program delivery through research and learning studies, including the following:

1. What is the distribution of program graduates' occupational activities and economic outcomes over time? Do they persist in the vocations in which they were trained? What is the distribution of economic well-being and growth across graduates over time, and how can we better relax key constraints to women's economic activity and earnings growth, including constraints such as unpaid care?
2. Is it more effective to provide a lump sum of cash transfer at the midpoint or end of the program, rather than a monthly cash transfer?
3. Is it more effective to provide asset transfers at the end of the program to facilitate economic activities, in addition to or in place of the monthly cash transfer?
4. Do participants' food security levels improve over time, through which aspects of the program (training vs. resource transfers), and what are the implications for the health and growth opportunities of participants and their families?
5. In fragile environments, do group enterprise/cooperative structures provide better support for sustained profitability, scale, and accessing linked functional markets compared to individual-run and owned enterprises?
6. How does improving the financial capabilities of women affect their ability to claim their rights in various economic domains, and how do improved claim of rights affect women's economic outcomes?
7. How do we best facilitate sustained saving behavior among women?
8. Is it more effective to shift our focus from vocational training to entrepreneurial/business skills training? Does this vary by country?

Recent research and evaluation projects under Women's Economic Empowerment (completed, ongoing, and forthcoming):
- Exploratory comparative study on social cohesion and economic resilience among WfWI program graduates in Afghanistan and Kosovo (2015, funded by Millby foundation grant)
- Study of Occupational and Economic Well-being among Marginalized Women in Rwanda: An Assessment of Graduates of WfWI Training Program (2015, funded by Millby foundation grant)
- Evaluating the impact of improving women's agency and participation in decision-making on household economic and social outcomes in DRC (2017-2020, funded by FLOW grant).

(C) Men's Engagement

The field of men's engagement to enable improved women's outcomes is still at a nascent stage. Most programs have so far been focused on improving maternal and child health outcomes. Nevertheless, the focus has recently shifted to programs with a gender transformative component that directly tackle gender norms. Research points to the effectiveness of a combination of a) group education sessions targeted at changing attitudes and b) community outreach campaigns targeted at changing behaviors (or intentions).

So far, there has been an absence of careful studies and evaluations on the impact of men's engagement in facilitating women's economic and social empowerment. Drawing from more than a decade of experience implementing a men's engagement program in several COs, WfWI seeks to

add to the knowledge in this field by rigorously evaluating the impact of our men's engagement program.

As part of this impact evaluation or through independent studies, WfWI seeks to answer the following questions:

1. What are the best methods to engage men in WfWI's different country programs, taking into account program design variations and country contexts?
2. What are the effects of different men's engagement models on women's experience of Gender-Based Violence in varied settings (for example in camp and non-camp conflict-affected settings)?
3. Does a "Cascading Training" men's engagement approach or a direct male family member engagement programming approach work better in increasing the individual empowerment of women and balance of power in the home among program participants?

Recent research and evaluation projects under Men's Engagement (ongoing):
- Longitudinal Evaluation of Women for Women International-Nigeria's Men's Engagement Program to Promote Women's Rights and Create a Gender-Balanced Society (2014-2016, funded by DFID grant and Millby foundation grant)

Topics that lie outside the three priority research and evaluation areas

In a five year timeframe, we do anticipate that specific research and evaluation opportunities might arise that lie outside the scope of the three focal areas outlined above. Ensuring depth of work and high-quality research outputs necessarily requires drawing certain boundaries to limit topics/questions that will be prioritized. However, if dedicated resources are generated in this period for specific research work to accompany targeted programmatic investments/policy outcomes funded through a grant, then we will consider these research projects on a case by case basis to determine their value and priority. As an example, taking a deep look at the nutritional outcomes of participants' children as part of a grant to measure WfWI's work as it contributes to global goals on children's health might be considered if it is fully-funded and speaks to a key organizational programmatic/policy priority.

Similarly, broader community-level effects and impact (spillovers, ripple effects, multiplier effects) on non-participants remains an important area for research and evaluation, especially in areas where WfWI has run programs for many years and reached a large share of eligible women. However, since this is a complex research and evaluation question to investigate, it is expected to be a core focus of the organization's MERL strategy in the next 5-year period. The current strategy that is focused on deepening our understanding of individual and household-level outcomes and impact will set the foundation for examining pathways of impact at the level of the community more rigorously in the subsequent period. In the meantime, under the current MERL strategy and as discussed in the Monitoring section on p3, our pilot tests of community assessments 3-5 years after we have worked in a community will provide a starting point and stepping stone for exploring how our programming might affect not just individuals who are directly trained, but non-participants in the community as well.

PROCESS FOR INITIATING RESEARCH AND EVALUATION PROJECTS

We expect to follow a clear and transparent process for selecting research sites for specific research and evaluation projects, based on scoring alternative country and program sites along the following criteria:

- Sufficient security levels in the target geography that can support research and evaluation activities over the entire study/project period.
- Implementation of programs/program components that are best aligned to answer (and benefit from) a given research or evaluation question within one of the three priority areas.
- Availability of funding to support research and implementation costs for a research or evaluation project in a given setting.
- Bandwidth and readiness of the country office team, specifically the M&E Manager, to take on a key role in supporting a new research or evaluation project (in some cases, the research or evaluation project budget will include funds for hiring a dedicated staff person to manage the research and evaluation project).
- Requirements to conduct a research or evaluation project in a specific setting under donor or other stakeholder obligations.

The Research and Evaluation Project Pipeline spreadsheet will be reviewed at each global MRE meeting to bring all M&E Managers up to speed on concluded, ongoing and planned research and evaluation projects and receive inputs on potential sites for new research projects. *All research and evaluation projects, whether internal or external, must be raised for discussion at an early stage during a global MRE meeting (held every c.6 weeks) to receive input on design from peers and to plan adequate support for the project. All research and evaluation proposals (whether standalone or part of project proposals) must receive written sign-off by the Director of Monitoring, Research and Evaluation or the VP of Programs.*

CAPACITY BUILDING

No part of the MERL strategy can be designed or implemented without strengthening our capacity as an organization to engage in the listed activities with increasing levels of competence and skill. Towards this end and as part of the organization's strategic objective of **"investing in people and systems to deliver results,"** we will engage in three strategies for investing in the capacity of all staff involved in MERL activities within the organization:

Internal Capacity Building. The global MRE team comprising of M&E Managers and HQ MRE staff, and including UK policy staff, will meet once a year to take stock of all MERL activities, strategies and results executed in the past year, and to plan activities and strategies for the year ahead. This annual meeting will be a key forum for the exchange of ideas, best practice and lessons learned. As per the June 2016 format of this annual meeting, select training will be provided to Program Managers from country teams as well to make sure that they are also able to contribute to M&E and learning activities that are built into programmatic implementation. This will be supplemented by online discussion forums, trainings and meetings held regularly (once every 6 weeks) by members of the global MRE team. A key aspect of internal capacity building will involve periodic trainings conducted in turn by M&E Managers for their teams comprising of M&E Officers and Assistants in each country office.

Trainings involving Partners and Affiliates. WfWI's global MRE team will undertake capacity building activities for program partner agencies with whom we pursue collaborative work in existing country offices or in new locations (such as the Kurdistan Region of Iraq). This will include capacity building for work undertaken by partner agencies under sub-grant agreements with WfWI, based on available resources and bandwidth. Similarly, WfWI will work with Affiliates to support capacity building across the network, while also drawing on Affiliates' expertise and capacities to contribute to sharing skills and lessons learned globally.

Trainings by External Research and Evaluation Partners. As part of all research and evaluation projects undertaken by the organization, we will specify capacity building of the CO M&E team to be a key aspect of the deliverables of the research and evaluation partner's scope of work. This could take the form of training workshops conducted in research and evaluation methods (qualitative or quantitative), observation of data collection methods, training in analysis techniques, or other activities.

The focus of our capacity-building work will be determined dynamically based on identified areas of need/improvement and alignment with new programmatic areas of work. In response to current program areas in need of greater measurement capacity, our MERL capacity-building efforts will include a focus on measuring outcomes related to violence against women, community advocacy, cooperative/business group management and cohesion, and microenterprise viability.

LEARNING FROM MONITORING, RESEARCH AND EVALUATION

The initiation of all external research and evaluation projects currently follows a systematic process that is itself the result of organizational learning in the 2013-2015 period – this includes the process used to issue a call for proposals, the transparent review and ranking of proposals, appropriate budgeting for research activities, designing contracts/service agreements with research partners, publication rights and communication of research, and managing risks around projects appropriately including through the use of clear data use agreements.

In order to encourage learning from monitoring, research and evaluation findings, WfWI will implement a corresponding systematic process for review, response, and reaction from HQ, UK, and COs.

For any monitoring, research and evaluation output, findings will be reviewed internally by the Global Program Unit (in some cases, including WfWI UK) and the relevant country office. In the review, the team will discuss study methodological strengths and limitations, recommendations, programmatic implications, and next steps in moving forward with the findings. Findings would also be discussed by the global MRE team.

Following this initial review, the report and Global Program Unit's response will be shared with the relevant CO staff and the Global Leadership Team, and a discussion will be organized to collectively analyze and understand the design and findings of the specific MRE output. For relevant reports, particularly those involving recommendations or unexpected findings, the CO is expected to provide a **Management Response** reflecting their thoughts, intended actions and timeline following the report findings. This step will help encourage an organizational culture of reflection, learning, and accountability.

For each of the above cases, a pointperson will be selected who is responsible for tracking the implementation of actions stemming from the Management Response. This person will be listed against the project in the Research and Evaluation Project Pipeline tracker.

When possible and relevant, we will share research and evaluation reports and their findings in various forms, including through WfWI's website, seminars, and lessons learned briefings, with external stakeholders and the broader international development community. Any research that is specifically commissioned to provide clear, evidence-based recommendations for decision-makers and other key influencers to address the issues of the women we serve, will be prioritized for external circulation. A set of current research and evaluation outputs can be viewed on the organization's Impact webpage, listed on a sidebar with links to the documents for all interested readers - http://www.womenforwomen.org/what-we-do/impact .

COMMUNICATION OF LEARNINGS

The material generated by different forms of learning activities – whether monitoring, research or evaluation – will be synthesized into a set of outputs that each target a specific readership/audience, as described below.

Full Research Papers and Evaluation Reports. These documents will present the entirety of a specific research or evaluation project, and follow a more academic structure that includes: an abstract/executive summary, study design, study methods, sampling/respondent selection approach, study tools, findings that correspond with each research question, study limitations, and program recommendations. These papers are meant specifically for internal reflection and decision-making, and for academic and institutional donor audiences.

Thematic and Program-related Learning Briefs. These shorter documents, typically four to eight pages in length, will synthesize or summarize a specific monitoring, research or evaluation project into a set of key insights. These learning briefs will often follow a structure that includes: target problem, tested solution, results obtained, challenges encountered, and recommendations for practitioners and policymakers interested in the target problem. They will include infographics for ease of reviewing results and trends.

Thematic and Program-related Policy Briefs. These very high-level documents, often two to four pages in length, will focus on presenting key insights from our programs including a snapshot of results, primarily for policymakers, partners and donors interested in a very brief summary of program activities, innovations and results. They will include infographics for ease of reviewing results and trends.

Policy Papers. In our advocacy work, we will present our results and evidence through a variety of policy documents that may include parliamentary evidence submissions, short briefings, report cards relating to policy agendas, etc. These papers will be used as part of advocacy efforts and tailored to each target audience/country context based on additional policy analysis.

The dissemination of findings from MERL activities will balance the aims of:

- Providing insights to the relevant external sector for collective and transparent learning;
- Demonstrating the value of program interventions in all their complexity;
- Ensuring that there are no risks to WfWI programs or participants from any public discussion around specific MERL projects or findings.

Our MERL findings will form the foundation for our policy outreach and advocacy communications and we will situate our results and evidence as credible and relevant within key international policy agendas. Specifically, we have prioritized the following global policy agendas around which to anchor our policy contributions:

(i)   the **Sustainable Development Goals** (SDGs) that seek to "end poverty, protect the planet, and ensure prosperity for all";

(ii)   the **Women's Human Rights agenda** that seeks to protect women from discrimination based on sex and promote equality before the law;

(iii)   the **Women, Peace and Security (WPS) agenda** that aims to promote women's participation and gender equality in all peace-related processes, and protect women from conflict-related sexual and gender-based violence.

We also expect to use our learnings to strengthen our contributions towards forums such as the SEEP network, the Ultra-Poor Graduation model's scale-up coordinated by the World Bank's Consultative Group to Assist the Poor (CGAP), the What Works to Prevent Violence Against Women and Girls global program funded by DFID, the Gender Action for Peace and Security (GAPS) network, and the Gender and Development Network (GADN).

PARTNERSHIPS

WfWI seeks to establish partnerships with key academic, research and policy institutions as collaborators in designing, implementing and learning from our research and evaluation activities, and as advisers through participation in the Research and Evaluation Council.

In the 2013-2016 period, we have initiated collaborative partnerships around joint proposals, research and evaluation design and implementation, and policy dialogue with the following global institutions:
- International Center for Research on Women (USA)
- Medical Research Council (South Africa)
- London School of Economics (UK)
- Overseas Development Institute (UK)
- Innovations for Poverty Action (USA)
- American Institutes for Research (USA)

A key aspect of building effective research and evaluation partnerships involves the development of close links with local research implementation and policy-influencing institutions in the countries where we work. To date, we have engaged with a selection of such institutions primarily as implementers of research and evaluation projects initiated by WfWI and often designed by other research institutions, including the following agencies:
- Health Policy Research Group (HPRG), College of Medicine, University of Nigeria Enugu-campus, Enugu, Nigeria
- Afghanistan Public Policy Research Organization (APPRO), Kabul, Afghanistan
- FATE Consulting Ltd., Kigali, Rwanda
- DOTS, Pristina, Kosovo

We expect to widen the scope of local research and policy institutions with whom we work to implement our research and evaluation systems and disseminate findings in each of our countries.

Each Country Director will provide guidance on the national research and policy institutions with whom we can develop meaningful collaborations, and the CO M&E Manager will be responsible for developing and maintaining these relationships and linking local partnerships with components of the global MERL strategy.

We will also explore the possibility of having active collaborations with PhD students and other research program candidates at academic institutions, either as interns or as research collaborators, who could explore specific questions of interest to WfWI programming within their discipline and research program.

Where useful, we do expect to pursue joint programs with other women's rights and development organizations to pool funding and seek out research partners who can examine a set of overarching research questions in women's social and economic well-being related to joint collaborative programs and learning.

ROLES AND RESPONSIBILITIES WITHIN THE GLOBAL MRE TEAM

The research and evaluation effort of the organization will be primarily led by members of the Monitoring and Evaluation (M&E) Units at Headquarters (HQ) and COs, in close coordination with the Policy Manager in the UK office, other program team members and internal and external stakeholders.

MRE team at HQ. The development of global monitoring protocols and processes, and research and evaluation projects will be led by the MRE team at HQ, with the goal of building CO M&E staff capacity to be able to design and lead research projects in the subsequent MERL strategy.

M&E team at COs. CO M&E staff will oversee the implementation of all monitoring activities and provide inputs into research design and development. They will be primarily responsible for coordinating research activities in the field and collaborating with local research and evaluation partners. They are also centrally involved in interpreting results and incorporating lessons learned into programs. Over time we expect CO M&E staff to take on greater responsibility in leading in-country research projects with support from HQ.

Policy team at WfWI UK. The UK policy staff will work closely with the MRE teams at HQ and COs to develop policy-relevant outputs, and coordinate specific research and evaluation collaborations that are managed by WfWI-UK.

Research and Evaluation Council. To encourage wider technical engagement in our research and evaluation efforts, WfWI plans to establish a Research and Evaluation Council, consisting of a broad spectrum of experts in **research methods, poverty alleviation, conflict and fragile environments, and women's rights and gender equality**. The Council will provide technical advice and support for WfWI's global MERL activities. The composition of the Council will be determined before the end of 2016, through a committee comprised of two M&E Managers from COs, the Policy Manager from the UK, and the Director of MRE at HQ, who will submit their joint recommendation to WFWI's global leadership team for approval.

Implementing the MERL strategy will involve inviting inputs from each country office, including from Social and Economic Empowerment Managers, Program and Country Directors, to determine what is prioritized for learning in specific projects. *It is important to bear in mind that learning and accountability are ultimately the responsibility of program managers who are responsible for quality program implementation. These goals are supported by line managers such as the M&E Managers. However, the integrated implementation of this MERL strategy and its activities by the entire Senior Management Team in each country office is essential to reflect MERL being an organic, organization-wide priority.*

RESOURCES

In 2016, WfWI dedicated close to 3% of its annual total global budget to MERL activities and resources from across a variety of funding sources. We commit to continue investing a minimum of 3% and have an ambition to raise restricted resources to bring our MERL investment up to 5% of our annual global budget by 2020 (through funding for monitoring, research and evaluation activities of our programs within grant proposals, as well as through dedicated grants providing research and evaluation funding). For innovation programs, we expect that it will be necessary to set aside a higher percentage of the project's total budget dedicated to MERL activities and components. We expect to commit a significant amount of time to raising the additional funds needed to implement this MERL strategy.

A large share of funding for MERL activities has been provided through institutional grants such as the Millby foundation grant, alongside significant investments by private major donors and institutional donors such as Bloomberg Philanthropies, the Cartier Charitable Trust, DFID and the Ministry of Foreign Affairs of the Netherlands in pushing our monitoring systems forward and investing in strategically important research and evaluation activities. This strategy and its vision for the way forward are built on these vital investments, and we hope the evidence and learning generated by 2020 under the current strategy will go far in building the case for public policy at large on what works in sustainably enabling women to determine the course of their lives and reach their full potential in fragile settings.

For any questions related to Monitoring, Evaluation, Research and Learning at Women for Women International, please contact us at **research@womenforwomen.org** .

ANNEX A: TERMS AND DEFINITIONS

Activities: The collection of tasks to be carried out in order to achieve an output.[3]

Attribution: The degree an observed or measured change can be ascribed (attributed) to a specific intervention versus other factors (causes).[1]

Evaluation: The systematic and objective assessment of an ongoing or completed project, program or policy, its design, implementation and results, intended to assess progress towards and the achievement of an outcome.[1]

Formative evaluation: Evaluation intended to improve performance, most often conducted during the implementation phase of projects or programs.[1]

Impact: Positive and negative, primary and secondary long-term effects produced by a development intervention, directly or indirectly, intended or unintended.[1]

Impact evaluation: Impact evaluations estimate program effectiveness usually by comparing outcomes of those (individuals, communities, schools, etc) who participated in the program against those who did not participate. The key in impact evaluation is finding a group of people who did not participate, but closely resemble the participants had those participants not received the program. Measuring outcomes in this comparison group is as close as we can get to measuring "how participants would have been otherwise."[2]

Inputs: The financial, human, and material resources used for the development intervention.[1]

Research: Hypotheses-driven activity intended to answer questions and generate knowledge in relevant domains to inform program design and development.[1]

Meta-evaluation: The term used for evaluations designed to aggregate findings from a series of evaluations. It can also be used to denote the evaluation of an evaluation to judge its quality and/or assess the performance of the evaluation.[1]

Monitoring: A continuing function that uses the systematic collection of data on specific indicators to provide management and the main stakeholders of an ongoing development intervention with indications of the extent of progress and achievement of objectives and progress on the use of allocated funds.[1]

Outcome: The likely or achieved short-term and medium-term effects of an intervention's outputs.[1]

Outputs: The products, capital goods, and services which directly result from the intervention. May also include changes resulting from the intervention which are relevant to the achievement of outcomes.[1]

Process evaluation: Also known as implementation assessment or assessment of program process, analyzes the effectiveness of program operations, implementation, and service delivery.[2]

Project evaluation: Evaluation of an individual intervention (or grant) designed to achieve specific objectives within specified resources and implementation schedules, often within the framework of a broader program.[1]

Program evaluation: Evaluation of a set of interventions, marshalled to attain specific global, regional, country, or sector development objectives.[1]

Summative evaluation: A study conducted at the end of an intervention (or project) to determine the extent to which anticipated outcomes were produced. Summative evaluation is intended to provide information about the worth of the program.[1]

Randomized impact evaluation: Randomized impact evaluation is a subset of impact evaluations that aim to evaluate the impact of the program, and more specifically quantify the impact of the program by comparing outcomes of those who participated in the program against those who did not participate. The primary difference is the assignment to participation or non-participation is determined randomly. Also known as randomized control trials.[2]

[1]OECD-DAC Network on Development Evaluation Glossary of Key Terms in Evaluation and Results-Based Management.
[2]Abdul Latif Jameel Poverty Action Lab.
[3]IFRC Monitoring and Evaluation Guide.

ANNEX B: SELECT RESEARCH AND EVALUATION PROJECTS

WfWI has conducted several research and evaluation projects in the past; often they have been initiated on an ad-hoc basis or driven by donor requirements. A few of these past projects are described in brief below. *Note: A longer list of all internal and external research and evaluation projects conducted by the organization is available in the Research and Evaluation Project Pipeline file (supporting document).*

Exploratory study on Marginalized Women's Social Cohesion and Economic Resilience in Afghanistan and Kosovo

This study conducted in 2015 examined whether and how WfWI's core program supported individual women beneficiaries in building social cohesion in their communities, and whether and how they were able to effectively manage economic risk and shocks as graduates. Social cohesion and economic resilience were examined for their role in peace-building in fragile settings. The study found that holistic approaches to education in conflict-affected countries are both necessary and provide effective support for even the most marginalized women to change both attitudes and behaviors and build confidence in their abilities and status.

Study of Occupational and Economic Well-being among Marginalized Women in Rwanda: An Assessment of Graduates of WfWI Training Program

This study conducted in 2015 took a detailed look at current occupational activities and economic well-being (earnings, expenditures, investments, assets, risk management) among Women for Women International graduates in Rwanda with varying experiences related to improving their economic well-being over time. The study involved the use of quantitative sample surveys and qualitative life history interviews to understand graduates' occupational activities, use of vocational and business skills, household expenditures and assets. The study pointed to a number of key persisting barriers to the pursuit of new vocational activities post-training including linkages to functional markets (capital, inputs), competition, profitability, high dependency and care-giving responsibilities, length of training in a new skill, all of which have been used to design and inform advanced training and support services for graduates in Rwanda.

Bridging the gap: the gender impact of the rule of law and its application in Bosnia-Herzegovina and Kosovo

In 2013, WfWI UK commissioned in-country researchers to understand the impact that laws and protections for women's economic participation had on women participants in Bosnia-Herzegovina and Kosovo. This research was launched at a joint conference with the European Bank for Reconstruction and Development (EBRD) along with EBRD research on women's access to finance and World Bank research on discriminatory and protective legislation on women's rights. http://issuu.com/womenforwomenuk/docs/wfwi_research_report_aug_2013_v7b_1

Learning on Gender and Conflict in Africa (LoGiCA)

In 2013, WfWI partnered with ProMundo to pilot a men's engagement program in DRC that targets husbands and/or male family members of WfWI's program beneficiaries. An evaluation was built around the pilot to assess the impact of the pilot on participants and their wives (female family members).

DANIDA Evaluation Report: Business Skills Training and Income Generation Pilots in DRC and Rwanda

In 2013, a qualitative evaluation was conducted on several vocational training pilots and business skills training in DRC and Rwanda. The evaluation revealed the importance of in-kind support to launch women's livelihood activities beyond petty trade and subsistence-level agriculture. In addition to economic support, women needed closer monitoring and follow-up from the program. The pilots that required personal contributions from women demonstrated greater success, likely because of a greater sense of ownership from women. The results have been incorporated into subsequent program design, where start-up kits were distributed to a group of graduates in the following programming rounds in DRC and Rwanda.

KPMG Social Investment Report

In 2012, KPMG was engaged by Bloomberg Philanthropies and the NoVo Foundation to conduct an assessment of the two partners' joint investments in WfWI in the 2009-2012 period, and to identify leverage points for continued impactful investment on positive outcomes for women in conflict-affected environments. The assessment involved surveys and focus group discussions with a sample of program graduates in Rwanda and DRC, graduates' household members, community institutions and their administrators, alongside secondary data collected from official sources in the same areas. The assessment concluded that WfWI's program and the donors' investment had enabled key changes in attitudes of men towards women, had greatly enhanced economic opportunities for graduates and other women in the community, and importantly improved health and wellness for women and their children.

Stronger Woman, Stronger Nation Series

From 2007 to 2010, WfWI published a series of reports that focused on the status of women in Afghanistan, DRC, Iraq, and Kosovo. The reports were based on household surveys and interviews with women in these countries, with the goal of amplifying the voices of women survivors of war that is often lost amidst peace and political negotiations following ceasefire. The findings proved useful to inform the direction of internal program discussions, as well as to communicate to external stakeholders within the realm of women, peace, and security.

ANNEX C: LIST OF ADDITIONAL INTERNAL SUPPORTING DOCUMENTS

- Research and Evaluation Project Pipeline tracker (Excel file).
- Two background papers developed for the Research and Evaluation Seminar in November 2013 on the evidence around women's economic empowerment and men's engagement, and priority research questions in these areas identified in 2013 related to WfWI programs. (*Background papers to be reviewed and updated in 2017.*)
- Concept Note on the organization's Monitoring Tools & Process Revisions as of August 2013.
- Innovations for Poverty Action's case report of WfWI's M&E systems published in 2015 under the Goldilocks 'right-fit M&E systems' project (available externally here).