



Monitoring, Evaluation, Research and Learning Standards

Introduction

This document defines the standards that Plan International commits to follow within each step of our Monitoring, Evaluation, Research and Learning (MERL) work. It outlines five standards, each with multiple indicators which enable assessment of progress towards that standard.

These standards should be read together with the global Monitoring, Evaluation, Research and Learning Policy which is derived from the Programme and Influence Quality Policy, and articulates the importance of MERL to Plan International, defines each of the four components and outlines the approach that Plan International will take. In addition, it should be read alongside the Programme and Influence Quality Policy and Procedures (PQIP), Child and Youth Safeguarding Policy, Gender Equality and Inclusion Policy, Data Privacy Policy and the Data Retention Policy. These standards are further supported by the MERL Competency Framework; MERL Accountability and Responsibility Framework; and MERL guidelines, templates and procedures which outline how they should be applied.

Application

These standards apply to all work that is undertaken by Plan International offices under the global Programme and Influence Quality Policy. They apply irrespective of the funding source and to all of Plan International's development and humanitarian programmes and projects.

These are the minimum standards required for quality MERL initiatives, whether conducted by external consultants or internally. The standards support Plan International to produce credible and robust evidence for programme and influence work. Additional donor requirements can be integrated as required, as long as these minimum standards are met.

Plan International offices are responsible for ensuring that these standards are adhered to by all staff and volunteers involved in MERL initiatives, including those undertaking work in partnership or on behalf of Plan International.



Standard 1: MERL initiatives must adhere to ethical standards

- 1.1 MERL initiatives ensure that the rights of those participating in data collection or analysis are respected and protected, in accordance with Ethical Guidelines. This means, amongst other things, ensuring:
- Informed, documented and voluntary consent of the participant, and in addition, where the participant is under 18 years of age, the consent of their parent/guardian
 - Confidentiality and anonymity is guaranteed for participants, with the exception that in some cases an adult participant can consent to their identity being disclosed¹
 - Appropriate support is offered to participants of data collection, particularly if safeguarding issues may arise or if sensitive issues are being discussed.
- 1.2 MERL initiatives conduct an assessment of potential risks to participants before starting. Appropriate actions must be taken to mitigate those risks
- 1.3 Prior to data collection commencing, research initiatives apply for ethical approval from a research ethics committee/institutional review board within the country of research as appropriate,² and/or from the Plan International Research Ethics Team

Standard 2: MERL initiatives are well conceptualised and designed

- 2.1 The MERL type, and method adopted, is clearly defined and articulated in the form of a Terms of Reference (ToR) or M&E framework, and appropriate for:
- Addressing the information need and the timing for when that is needed
 - The respondents, with a particular focus on the target populations
 - The resources allocated and the period of implementation, recognising what is required for the methods selected
- 2.2 MERL initiatives specifically aim to understand and explore gender attitudes and power dynamics, including why they exist and how they change.
- 2.3 MERL initiatives meaningfully engage relevant people during the conceptualisation process. This can include but is not limited to representatives from target groups and subject matter experts.
- 2.4 Detailed methodologies and tools are designed and tested to collect reliable and accurate data in line with the areas of enquiry identified during the conceptualisation process.
- 2.5 MERL initiatives employ participatory tools and methodologies wherever possible in order to meaningfully involve target populations, including girls, women, and other marginalized groups in design, data collection, and analysis processes.
- 2.6 When using digital tools, MERL initiatives give due consideration to the Principles for Digital Development

Standard 3: MERL initiatives are appropriately planned

- 3.1 Comprehensive implementation plans are developed for MERL initiatives, defining all terms and setting out tasks, roles and responsibilities, timings and accountabilities as relevant to the context and in line with the PIQP Procedures.

¹ We will still collect personal information, where required, but when we do, we will put the systems and processes in place to ensure confidentiality and anonymity.

² Note, this will be dependent on the availability and appropriateness of such a body in the country, and whether such a process is mandatory in country



- 3.2 MERL activities are organized and scheduled in such a way to make them accessible to target populations, including girls, women, and other marginalized groups
- 3.3 Data collected is disaggregated according to Plan International's Minimum Participant Data Disaggregation Guidelines.
- 3.4 MERL initiatives are appropriately resourced, with detailed budgets taking into consideration all actual costs, as per Plan International's MERL Budgeting Guidelines (forthcoming).
- 3.5 All contractees and volunteers, especially consultants and enumerators, are appropriately qualified, prepared and trained for their responsibilities.

Standard 4: MERL initiatives are well implemented, with adequate management oversight

- 4.1 MERL initiatives are managed by the responsible Plan International staff, in line with the design and planning, with ongoing review and adaptation as necessary.
- 4.2 All data collected as a part of MERL initiatives is checked for quality and accuracy, in line with Plan International's Data Quality Assurance Guidelines.
- 4.3 Data ownership, transfer, retention and management adheres to Plan International's Data Retention Policy.
- 4.4 Data from MERL initiatives is analysed and presented in a systematic, rigorous and comprehensive way that is appropriate to the MERL conceptualisation and design, and in line with Plan International's values.

Standard 5: MERL initiatives are used for accountability, and to drive learning and improvements

- 5.1 Evaluation, Research and Real-Time Reviews are formally approved by management, and have a management response within a maximum of two months of report completion, in accordance to Plan International's Management Response template and guidelines.
- 5.2 MERL findings, as well as lessons learnt from the process, are discussed and reflected on amongst appropriate stakeholders to inform learning and improvements.
- 5.3 Findings from MERL initiatives, and our response to those findings, are fed back to representatives of target groups and stakeholders in a timely and appropriate manner.
- 5.4 Monitoring findings are reviewed and discussed on at least a quarterly basis in line with the PIQP quarterly review process
- 5.5 The presentation of findings and data by anyone in the organisation must be done responsibly, for the purposes which it was intended, and for which consent was given.
- 5.6 Findings from research and evaluation initiatives are, at a minimum, published on Planet and Plan International's external website, except where there is an unacceptable risk of repercussion to staff, partners or communities.