

MERL INFO SESSION

October 28th &
November 4th
2020

WHAT WE WILL COVER TODAY

Recap on our progress so far: the road to our MEL Frameworks and baseline (15min)

Developing a portfolio learning work plan: how to refine learning questions, our learning process, connecting leaning and MEL frameworks (45 min)

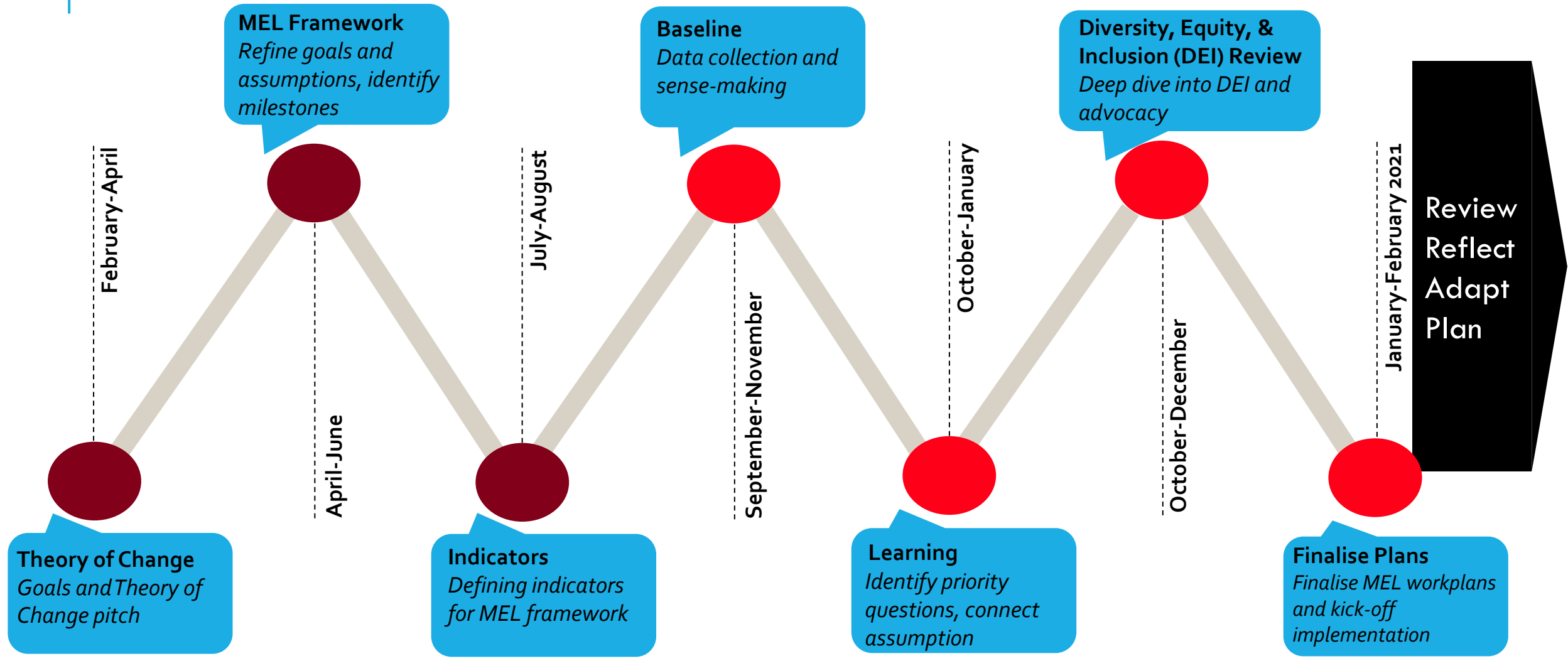
Questions and comments (20-30 min)

OUR PROGRESS SO FAR

The road to our MERL
frameworks and baseline

- Concluded
- Ongoing

WHAT HAVE WE COVERED AND WHAT IS TO COME?



WHAT OUR MILESTONES LOOK LIKE

16*

Changes in practice: shifts in attitudes, public behavior, ways of working and practices of groups of interest in a specific direction

16

Ecosystem building: Shifts at organizations or network that translate as capacity to engage with the field or that affect the field

13

Changes in policy: changes in policy or legislation, including policy improvements and implementation

11

Coalition building: shifts on capacity, willingness and/or opportunity of groups to build connections to advance an agenda

10

Changes in narratives: Changes on how our groups of interest perceive, think and talk about an issue

* Number refers to the number of milestones in each category.

WHERE ARE WE NOW? BASELINE DATA COLLECTION

Why conduct baseline?

- **Validate and adjust!**
- Context
- Data availability
- Relevance
- Feasibility

What will use the baseline for?

- A **light-touch review** of key references and data based on the indicators for each portfolios
- Identify places where information is **missing or insufficient**
- Identify **frameworks and methods** that could help us gather data where it doesn't exist yet

What else will this review include?

- Go back to portfolios **for initial sense-checking** on data collected
- Continue to **reach out to portfolio leads** for context, references, priorities
- Further analysis to find **overlap in frameworks and data collection opportunities**

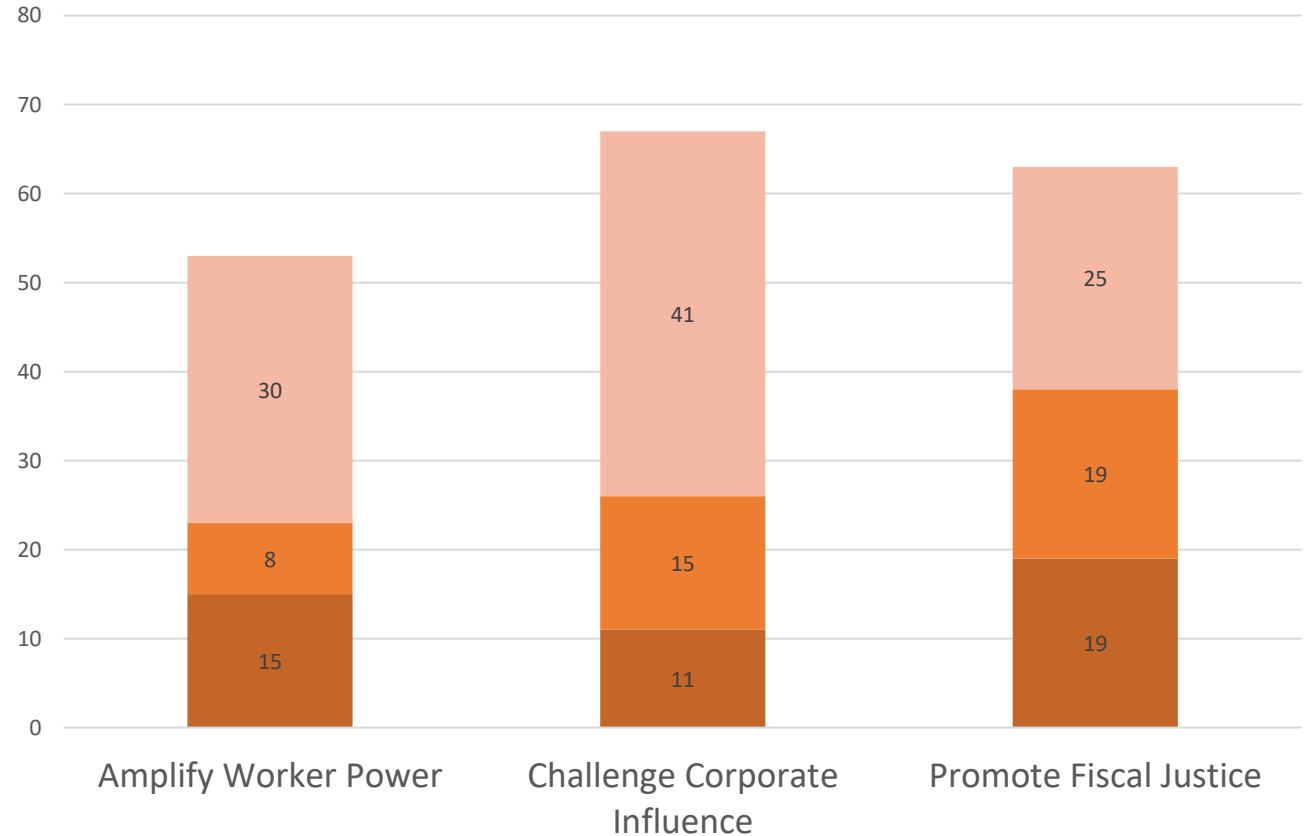
WHAT OUR BASELINE LOOKS LIKE?

Type 1: Indicators with baseline is zero, e.g. policy approved

Type 2: Indicators with baseline that is internal (i.e. from grantee reports) or require light work

Type 3: Indicators with baseline that requires accessing/processing large amounts of information, interviews, literature review

Indicators by type of baseline, per strategy pillar



DEVELOPING A PORTFOLIO LEARNING WORK PLAN

And Connecting it to
M(onitoring) &
E(valuation) &
R(esearch) ...
yes, we are becoming MERL

WHAT IS PORTFOLIO LEARNING AGENDA

Our portfolio learning agendas identify a set of key questions, the answers to which can improve the design and practice of individual portfolios and thereby impact.

Good learning agendas help to refine and test our understandings about the issue and the contexts in which we operate.

This is not to be confused with our Shared Learning agenda which also is designed to improve practice. But portfolio learning agendas are the **responsibility of the portfolio teams**. MERL (we are now MERL) buddies are here to help.

A GOOD PORTFOLIO LEARNING AGENDA

Asking questions is easy.

Asking questions that can strengthen our portfolios by

- Testing our assumptions
- Validating or Refute our Theories of Change
- Right-sizing or changing our Outcome expectations (including timeline)
- Adapting our funding strategy (e.g., the sequencing of funding)
- Altering our advocacy strategy
- Identifying funding partners and/or
- Modifying goals (including making them more attentive to priorities such as DEI or organizational health)

... is harder.

PORTFOLIO LEARNING & STRATEGY MANAGEMENT

Together with checking progress against indicators, portfolio learnings will form a part of our annual **Review, Reflect, Adapt and Plan** (RRAP) Sessions, our annual reflection and accountability process that aims, among other things, to iterate portfolio strategies, improve design and practice.

The heart of that process involves taking stock of what has been learned to date from what we have done and from our engagement of the issue. The portfolio learning plan is intended to make that process more intentional.

To help the RRAP process we will assist each portfolio over the next few months to

- Identify priority questions, specifying how the answers will help strengthen the portfolio and feed into plans for the coming year(s)
- Break the questions into manageable pieces, with timelines for answers and methods for answering them, connecting where possible to monitoring.

THIS IS BY NO MEANS THE WHOLE OF WHAT RRAP ENTAILS BUT A KEY PART

PORTFOLIO LEARNING PROCESS & YOUR MERL BUDDIES

The MERL team is here to help you with developing a portfolio learning plan

- We are not here to learn for you; you have to own it
- This is not compliance ... for the most part ... you will be asked to identify at least 1-2 questions that will have at least provisional answers by the RRAP session
- I.e., apart from specifying primary questions, **this is voluntary**