

EURASIA PARTNERSHIP FOUNDATION: MONITORING, EVALUATION AND LEARNING

Whenever Eurasia Partnership Foundation (EPF) implements a project and/or is the lead partner in a consortium, it carries out the primary responsibility for the arrangement of Monitoring, Evaluation and Learning (MEL) of the programmatic, administrative and financial aspects of the project. EPF has sufficient human capacity, sophisticated tools and rich tradition for the management of internal and external MEL of its projects. EPF's MEL practices are embedded in EPF's programmatic and administrative policies and procedures:

- EPF trains and re-trains its team members in MEL, particularly focusing on performance, outputs, outcomes, results as linked to objectives, as well as capitalizing on unexpected positive results and impacts;
- EPF project teams have regular informal reflective discussions of their ongoing projects and activities;
- EPF project management teams have formal meetings twice a week;
- EPF team members undertake formal annual performance evaluations; people learn replacing each other, delegating and handing over the tasks, if needed; and when somebody leaves the organization, they should give a formal exit interview to the EPF management;
- EPF's Board of Trustees discusses the implementation of all projects in EPF's portfolio two times a year;
- EPF organizes several learning events throughout the year, and necessarily at least one retreat once a year.

EPF's institutional capacities to monitor and evaluate the progress of a project include:

- EPF personnel experienced in programmatic and financial monitoring;
- EPF's Policies and Procedures that include sections on procurement of services and goods and sub-grant management and many other important sections, such as on communication, teamwork etc.;
- EPF's proprietary grants/projects management system (GMS HOPE) that makes it possible to file and record all project-related activities and related expenses in a systematic and uniform way;
- Several management and MEL related video lectures.

EPF's project management and MEL practices are consistent with the requirements of major international donors, including the US Government, European Union, and others. EPF undergoes annual financial audit each year, conducted by a qualified independent public accounting firm in compliance with International Financial Reporting Standards (IFRS). When required by a donor, EPF also conducts a specific audit of a particular project, as well as arranges for an external M&E of the project (see below).

Internal MEL

As a rule, EPF installs the following tools for internal MEL:

- a) A MEL training for implementers of sub-awarded projects;
- b) Clear and straightforward system of narrative and financial reporting to EPF from sub-awarded projects and other direct beneficiaries (outputs, outcomes and lessons learned from these reports are incorporated in aggregate quarterly/annual reports that EPF delivers to the donor);
- c) Identification of lessons learned at each strategic planning stage to take them into account while planning the remaining part of the project with the direct beneficiaries, other stakeholders and the donor.

Following the MEL training, EPF starts the internal monitoring and evaluation of the project, which helps track the progress and effectiveness of the project implementation, as well as advises EPF and the project's direct beneficiaries on any mid-course corrections, if needed.

EPF collects narrative reports from beneficiaries (sub-grantees, experts, contracted researchers) to build consolidated quarterly/annual narrative reports for the donor. EPF makes relevant portions of its internal monitoring of the project available to the donor via these consolidated quarterly/annual narrative reports, as well as through direct (ad-hoc) communication with the donor. These narrative reports provide data on the accomplished work based on clear benchmarks, including quantitative, qualitative and gender-differentiated data. EPF and the grantees/direct beneficiaries collect performance information through post-event surveys, progress reports from implementing partners and site visits to project sites. EPF collects feedback from beneficiaries and stakeholders of the project on an on-going basis: feedback is collected from participants of trainings and other types of closed and public events. Every public event provides an opportunity for group and individual, verbal and written (hard-copy and/or on-line) comments and feedback from the beneficiaries and stakeholders.

As a rule, the donor's representatives are invited to the events/activities of the project. They also receive internal and external communication products of the project, which helps make them intimately aware of all the developments in the project.

Overall, the internal MEL of the project focuses on tracking the progress with achieving the key indicators for outputs and outcomes. At the same time, the methods for internal monitoring of the project are differentiated, so that some of them could gauge the daily developments in the project; others - the delivery of outputs linked to activities; yet others - the delivery of outcomes; and the final ones gauge the delivery or failure to deliver the result-oriented objectives. The internal MEL also considers the cost-effectiveness of the project to make sure that direct beneficiaries of the project implement their activities in the most efficient manner, e.g. minimize travel/lodging costs and provide greater synergy and linkage between different activities and events. EPF also tracks the unexpected impact and risks. All this data is included in the consolidated quarterly/annual narrative reports that EPF delivers to the donor.

- *Addressing Barriers to Equal Participation*

EPF has been one of the pioneer promoters of equality in Armenia. EPF promotes equality through a rights-based approach that stands for equal opportunities and equal access to goods and services, gender-sensitive planning and management, inclusive and participatory decision making at all levels. As a rule, EPF's projects also engage vulnerable and marginalized groups. To be able to analyze how these groups may benefit from the project, data collected in the course of the internal MEL is usually disaggregated and analyzed to distinguish the impact of the project on those groups, as well as on men and women. In particular, the internal monitoring of the project helps EPF (a) assess obstacles to equal participation and the risks of possible harm to these groups based on any ground, and (b) address those risks in a timely manner.

- *Quality of Outputs and Impact of Outcomes*

To ensure the quality of outputs and strengthen the impact of outcomes, EPF has a practice of identifying peer-reviewers for all kinds of publications produced as part of any of its activities and supported projects. The reviewers are requested to:

- a) Provide feedback on the content, style and design of project's products, if possible in writing; otherwise a verbal feedback is collected at meetings;
- b) Provide peer review on each produced publication, with brief feedback (if possible, in English).

EPF makes sure that the feedback is considered by its direct beneficiaries. Also, EPF provides the daily monitoring of (a) the reach, engagement (clicks) and comments regarding its online products, and (b) the quality and user-friendliness of all the publications and training manuals.

External MEL

When needed, EPF arranges for an independent evaluation of a project. In this case, EPF may make an open solicitation of applications from interested qualified external evaluators. The ToR should be agreed upon with the donor. The start of the external evaluation of the project is agreed with the donor. The external evaluator delivers a mid-term (draft) evaluation report and a final evaluation report. The major purpose of the mid-term evaluation is to inform EPF and the donor about issues that the project may face with the delivery of outputs and outcomes and the achievement of indicators as featured in the MEL plan. The mid-term evaluation indicates on what EPF has missed in its internal MEL efforts but may still has a chance to correct during the remaining part of the project. It may also advise EPF and the donor about more effective and efficient methods of accomplishing the project's activities and events, in which case relevant revisions may be done to the MEL plan. The mid-term report may follow the template of the final evaluation report (see below); however, it usually differs in depth in terms of capturing the project's progress, outputs, lessons learned, etc.

The final evaluation may be delivered closer to the end of the project. It usually addresses but may not be limited to the following objectives:

- 1) Assess the structure of the project in terms of its efficiency and coordination mechanisms between EPF and the direct beneficiaries on one hand, and between EPF and the donor, on the other hand.
- 2) Assess the relevance of project activities within the evolving political context in Armenia, as well as the efficiency (value for money) and positive synergies between project's activities (including those of sub-grantees/sub-contractors and other beneficiaries).
- 3) Recommend actions that may help sustain certain components of the project beyond its term.
- 4) Assess the level of achieving the project's outputs and outcomes as indicated in the MEL plan of the project. In particular, assess the level to which the expectations of EPF were met regarding the impact of the project.
- 5) Identify lessons learned, good practices and possible follow-ups for consideration of EPF and the donor.

The final evaluation report should as a minimum include the following parts:

- Executive summary;
- Introduction;
- Brief description of the project;
- Description of the evaluation methodology;
- Main body of the paper addressing the objectives of the evaluation;
- Annexes: ToR, field visits, people interviewed, documents reviewed, etc.;
- PDF or PPT presentation summarizing the report.

MEL in EPF's sub-granting and the 'fractal' approach

One of the major tools that EPF has used over the years to support civil society organizations (CSOs) is grant-making. In addition to the selection, distribution, evaluation, and oversight of grants, EPF builds the institutional capacity and internal controls of its beneficiaries and partners. Prior to grant implementation, EPF staff work jointly with grantees on project design, implementation schedule, evaluation process, and risk mitigation. Afterwards, EPF staff accompany and coach grantees throughout the grant project. EPF employs a unique proprietary grants management system, which enables a strict fiscal oversight of grant recipients. EPF provides a variety of types of grants: open-door (unsolicited) grants, based on open competition procedures; target (topical) grants; invited grants; as well as grants to individuals and unregistered groups. EPF may allocate grants of various sizes and various durations to various entities including physical persons, non-profits, and for-profits inside and outside of Armenia. Since mid-1990s, EPF (and its predecessor Eurasia Foundation) have allocated around \$30 million in grants in Armenia. The majority of this money came from USAID. Other key donors included EU, SIDA, the Netherlands, and FCO. In 2008-2019, EPF awarded around 400 grants totalling \$8.5 million in Armenia. Major thematic areas of EPF grants include civil society development, local governance, human rights, anti-corruption, conflict transformation, media development, and youth. In its grant-making, EPF adheres to human rights based approach, gender equality, environmental consciousness, inclusiveness and participation at all levels.

It is EPF's practice to offer all its tools and methods, including the MEL approaches, to its direct beneficiaries and those whose capacities EPF is building. Long-term projects' consortium

partners usually receive the full scale of such support. Similar with the other tools, EPF helps partners and grantees adopt as detailed as possible MEL plans, modify them, using the EPF blueprints, according to the needs of their organizations, and follow them.