Optimising Monitoring Approaches to Achieve DEIA Objectives

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This is the first report in Palladium's Monitoring, Evaluation, Learning, and Analytics (MELA) Portfolio series on integrating diversity, equity, inclusion, and accessibility (DEIA) principles into MELA work in international development. This series is a follow-up to the January 2022 Promoting Equitable Outcomes in International Development.

Introduction

Project monitoring—the systematic collection, analysis, and interpretation of data to track program processes and results—is crucial for program implementation and the achievement of development objectives.
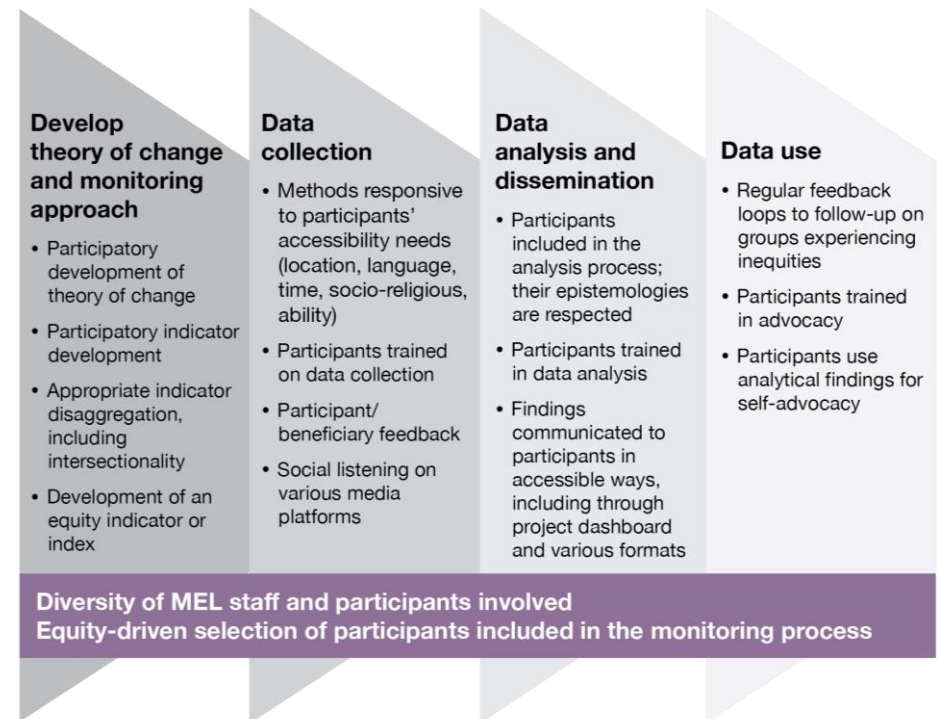
Monitoring provides core data for project learning and decision-making. However, it's sometimes conducted as a box-ticking exercise, and not all of the actors involved in a project are invited to fully participate in or benefit from those monitoring practices.

This sort of monitoring is insufficient for the equitable development – the reduction or eradication of disparities in social outcomes – that many practitioners seek, potentially reinforcing an inequitable status quo for communities in which development organisations work.

Thoughtful monitoring approaches do exist and can be used to enhance project performance and proactively mitigate inequities for participant communities. But historically, monitoring included the collection of data from project participants without much thought to whether the participants understood or could directly benefit from the process.

Below is a framework for applying DEIA principles to monitoring by centring participant communities to be the drivers of data generation and sensemaking. The framework divides monitoring into 4 steps:

1. Development of the theory of change and monitoring approach
2. Data collection
3. Data analysis and dissemination, and
4. Data use

Develop theory of change and monitoring approach
- Participatory development of theory of change
- Participatory indicator development
- Appropriate indicator disaggregation, including intersectionality
- Development of an equity indicator or index

Data collection
- Methods responsive to participants' accessibility needs (location, language, time, socio-religious, ability)
- Participants trained on data collection
- Participant/ beneficiary feedback
- Social listening on various media platforms

Data analysis and dissemination
- Participants included in the analysis process; their epistemologies are respected
- Participants trained in data analysis
- Findings communicated to participants in accessible ways, including through project dashboard and various formats

Data use
- Regular feedback loops to follow-up on groups experiencing inequities
- Participants trained in advocacy
- Participants use analytical findings for self-advocacy

**Diversity of MEL staff and participants involved
Equity-driven selection of participants included in the monitoring process**

The framework acknowledges that including communities in monitoring is necessary but insufficient in contributing to equity, both in terms of participation and social outcomes. Equally important is which participants are included in monitoring and how. Diversity, equity, and accessibility principles should be applied to the selection of participating community members and the roles they are given. Participants should represent the range of identities in the community and the selection of participants should be equitable, ensuring that the choice doesn't maintain or exacerbate the status quo.

Monitoring processes and their outputs should be accessible to all participants; and this includes methods to optimise the engagement of diverse community members. When appropriate, diversifying the monitoring team, including its leadership is critical.

"Project design starts with the theory of change, whose inputs include political economy analysis and root cause analysis."

Develop Theory of Change and Monitoring Approach

The development of the theory of change and MEL approach is the ideal phase to introduce DEIA considerations. Project design starts with the theory of change, whose inputs include political economy analysis and root cause analysis. These analyses identify inequities and a good theory of change contains information about the project's key actors and the injustices they face.

If participants agree on the utility of the process and participate in it, their contributions would ensure that these inequities are identified and addressed through activities. Indicator development with participants identifies information that is a priority to the donor, implementer, and participants. During implementation, monitoring data can be used to identify and measure inequities that need to be addressed, assess whether and how identified inequities are changing, and determine whether new inequities are being introduced.

Most projects already disaggregate indicators by important categories, such as gender, age, location, ability, and income level, but more attention could be paid to intersectionality; there may be participants who face compounded inequities across several variables, i.e., a young, Afro-descendent woman who is living with a disability in a rural area. Focusing on such information enables the project to allocate the right resources to communities in need of specific support. Finally, an equity indicator focused on specific inequities affecting communities can be used to measure progress and inform implementation.

Data Collection

Data collection need not be extractive, perfunctory, or colonial. It should be responsive to communities' accessibility concerns (location, language, scheduling, etc.). Moreover, participants can be trained to collect monitoring data. This builds participants' skills and ownership of results and increases the probability of achieving project goals and sustainability.

Social listening—a process for collecting public opinion data extracted from various media sources, including social media, radio, and news media—has the potential benefit of identifying communities that had not previously been included as relevant actors as well as surfacing all stakeholders' perspectives, not just a select few. Social listening enables broader and more frequent data collection, which can contribute to a richer understanding of the context and program results. Care should be taken to ensure that no biases against any groups are introduced into monitoring data.

Data Analysis and Dissemination

Communities should participate in data analysis, interpretation, and dissemination, and should know what their data indicates. Just as implementers share quarterly reports with donors, so should they share reports with participants. Project MEL teams should provide data analysis and interpretation training to participant communities so that they can better understand and act on data about themselves.

Participants should also be included and consulted on the analysis and interpretation of findings. This can be done by sharing draft findings with interested community groups and getting their feedback. They know their communities intimately and are best situated to make sense of analytical findings. Analytical findings should be shared in ways that are accessible

to all participants no matter their status. Donors and implementers should maintain cultural humility by making space for participants' epistemologies or ways of knowing.

Participants' perspectives and storytelling matter.

Data Use

Data use by communities could boost their ability to advocate for desired outcomes such as the reduction or eradication of inequities. As participants have been consulted and involved in the monitoring process from the beginning, they can use their knowledge of the data to engage in dialogue to persuade policymakers and other powerholders to make changes that could have real impact on barriers to equity in participant communities. In addition, project teams can train participants to champion their causes with data.

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Equitable Data Dissemination and Use in Action

Palladium's Feed the Future Malawi Agricultural Diversification Project (AgDiv) has developed exemplary participatory monitoring approaches. Community data collection agents collect monitoring data monthly and generate reports for each participant community.

These monthly results reports are the basis for community presentations with local leaders, such as Village Development Committee members. AgDiv disseminates the reports for use in local decision-making and advocacy. AgDiv also has soy kit entrepreneurs who are trained to keep simple financial records for their soymilk businesses. AgDiv and its partners collect soymilk business data from a sample of the entrepreneurs and share the analyses in trainings and peer mentorship activities to educate the entrepreneurs about the potential range of profit from soy kits and help them make business decisions.

Development projects should adopt DEIA-informed monitoring to support participants to use data to reduce inequities. However, there are challenges with these approaches. Donors and implementers must contemplate how to meaningfully include communities and share decision-making power with them.

Challenges to Implementing Equitable Monitoring Approaches

Some donors require development of the theory of change and indicators between themselves and implementing partners, but not participating communities. While some donors broadly use the language of equity, inclusion, and participation to describe their desires for their programs, there has not been sufficient specification of how programs and their MEL systems should be designed to promote these priorities and achieve these outcomes. Few communities are involved or consulted from the beginning of the program design process and donors still prescribe most of a program's parameters: sector, activities, duration, budget.

While USAID requests beneficiary feedback as appropriate for all of its implementation activities, other major donors do not. In addition, the structure of many large donor projects is such that direct interaction with participant communities could be difficult to initiate. Finally, the inclusive approaches described above could be considered expensive and time-consuming for all involved, and while implementers would be paid for that time, participants often are not. Though the challenges outlined above are significant, they are not insurmountable. One solution is that donors prioritise and fund DEIA-focused projects while calling for cost-effective approaches to meet these demands.

Palladium's MELA Portfolio believes that development practitioners should strive for project monitoring approaches like the one highlighted in the above framework because they lead to the achievement and enhanced sustainability of development outcomes and, in particular, equitable outcomes for participating communities. Palladium projects have embraced this philosophy; however, more can be done. We will continue to work to fully integrate these approaches into current and future projects.

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