**Notes from TOPS M&E Task Force Meeting**

**November 10, 2016**

**Participants**

* Jose “TD” Thekkiniath, CRS/ Nairobi
* Diana Stukel, FANTA/ FHI 360
* Sujata Bose, FANTA/ FHI 360
* Mara Russel, CARE
* Abdul Wadud, CARE
* Marta Perez, World Vision
* Nestor Mogollon, ADRA
* Laurie Starr, TOPS

**AGENDA**

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| **Introductions & updates** | 8:30 – 8:35 |
| **Task Force input to forthcoming TOPS M&E Manual** | 8:35-9:00 |
| **Continued Discussion: What are best practices in linking the project theory of change to M&E systems?** | 9:00-9:30 |
| **Brainstorm areas of interest for potential stakeholder consultation focused on M&E.** | 9:30- 9:55 |
| **Close** | 9:55-10:00 |

**NOTES**

Notes are not verbatim.

Recording here:  [**https://coregroup.adobeconnect.com/p6zdjq5m2f7/**](https://coregroup.adobeconnect.com/p6zdjq5m2f7/)

**TOPS M&E Manual**

**Laurie:** First topic is the TOPS M&E Manual. This document was started back when Arif was M&E technical lead for TOPS. It was put on hold until the FFP Policy and Guidance document was released. With the FFP draft close to being finalized, TOPS plans to complete its companion manual before the TOPS program ends next August. The FFP guidance document focuses on policy and what is expected, but does not have as much information on “how” to comply with FFP policy. The purpose of the TOPS document is to fill the gaps wherever more information on “how” is needed.

Content needs to be driven by Task Force input on “how to” gaps in the FFP guidance document. TANGO will do all the writing, but content must be responsive to input from M&E leads of FFP-funded programs.

**Mara:** Any guidance document needs to be extremely user-friendly and in multiple languages. There needs to be expert review…identifying folks who have the capacity to determine that a document is user-friendly and accessible to those who will be doing this work. It also needs to be comprehensive and accurate.

**Laurie:** That is a given and is part of the work plan.We will follow a similar process as the one we used to vet the M&E facilitator’s guide. Everything you mentioned except “published in many languages” can be taken care of. It will be a crunch to get an English version complete by the end of TOPS. If there is a TOPS II, there will be an opportunity for publishing the guidance in other languages.

There are three chapters that have already been reviewed by the M&E Task Force: *M&E Concepts; Project Design, and Qualitative Techniques.* There is no sense in going back to the original outline from 2012 when we have a brand new FFP M&E Policy and Guidance document to refer to.

Arif asserts that the content of the TOPS manual will not be determined by FFP, it needs to be determined by the users….ME practitioners. You are the best placed to determine where more guidance is needed.

What **practical guidance** is needed in written form to complement the FFP M&E Policy & Guidance document which is primarily about M&E compliance? Maybe some of the guidance in the FFP M&E Policy & Guidance document is enough; a chapter explains the concept clearly and ME teams are not stuck. But in the places where there is not enough information to help M&E teams understand how to effectively implement the requirements stated in the FFP document, the TOPS ME manual will fill those gaps.

**TOPS ASK to TF: Please review the FFP M&E Policy and Guidance document in depth and make notes on where gaps exist related to *practical guidance*. Please reach out to ME personnel within your organizations for input on what gaps to fill.** Additionally, we need to reach out to the PVOs who are less-active in this Task Force and gain their input.

**TD, Mara, Wadud, Marta, Nestor:** agree to identify where more practical guidance is needed.

**Mara:** Methodology for using indicators may be out there, but people may not be using it. Or guidance may not be out there. Need more guidance on how to measure specific indicators (e.g., gross margins or value of incremental sales) and how to produce good data, and need documents to be in other languages. Sharing information about indicators goes beyond a guidance document and requires more field-based training, more coordination with the Agriculture Task Force.

**Diana:** We have baseline & final evaluation indicators, typically collected by a third party, and there is pretty good guidance out there. There are also annual monitoring indicatorsthat partners are responsible for and there is the FFP Annual Monitoring PIRS. But PIRS are insufficient as a mechanism for understanding how to collect data.

Mara’s comment about needing more information on the specific ag. indicators is interesting because highlights that the gap may be in making sure people are aware of and have access to developed guidance.

There is a comprehensive FTF guide on the four most challenging indicators (gross margins, value of incremental sales, # of farmers using improved technology, and # hectares under improved technology). 100 pages and very detailed from a definitional, conceptual, and measurement point of view. FANTA has written another very detailed guide on how to collect data for these same four indicators using beneficiary-based surveys. It is peer reviewed and published on the FTF website.

So while there is really solid guidance on these four indicators, there is a gap for other annual monitoring indicators in all sectors. FFP is understanding that there is that gap and is beginning to think about how to provide guidance for other indicators.

**Laurie:** Back to the topic of the M&E manual, perhaps a piece of these TOPS manual can be a compendium of existing resources, including links to recordings of existing webinars on M&E topics.

**Promising practices in linking the project theory of change to M&E systems**

Background. TF agreed to develop a 1-page document on promising practices for linking the project theory of change to M&E systems. Started this document several months ago and have not progressed much. We had discussed advocating to FFP to include our “Promising Practices” in the formal FFP M&E Policy and Guidance, but since the TOPS M&E manual will be the sister document that offers “how-to” practical guidance, it is logical to house this piece in that manual instead.

There may be some confusion with the terminology. We initially called it best-practices and some folks seemed concerned that it would be difficult to rigorously capture best practices because PVOs are just starting to use TOCs. At this stage, we are simply talking about common sense. As we go through the process, our practices will evolve as we learn more. Right now this is similar to the common sense that we came up with in the ARR workshop. For example, you include your country team when you are fine-tuning your causal logic. You don’t create the TOC model in DC and then send it to the CO to implement and try to understand a DC-created TOC. The point of our TF document is to say, don’t forget these basic tenets.

Think about a checklist with an accompanying abstract.

Encourage TF to not be tethered to existing bullet points. This was our initial start from back in June. There will likely be more items as we become increasingly aware of promising practices that projects are initiating.

**What is the best way to complete this document?**

**TF:** Google EXCEL doc. with a comment sheet or column for each person’s name. Everyone does not need to contribute to every topic. If you see that someone has already made a comment don’t repeat it, but do put AGREE with \_\_\_\_, in your column, so we have a sense of what the majority of people believe.

Add name from an organization to ensure the product and action is done within the timeframe.

Timeline: draft abstracts before the next TF meeting January 12, 2017.

**Nestor:** We also need to have guidelines on how to review a TOC when the project is being implemented.

**TOPS:** Series of 2017 TOPS TOC workshops will address testing, validating, modifying TOCs. Doubtful there will be time to create a guidance document before the end of TOPS.

**Stakeholder consultations**

TOPS has hosted several stakeholder consultations between the PVO community and FFP, where both parties come together to find common resolution on problematic issues, and PVOs can gain clarity about various topics. During the three 2016 consultations, M&E has been raised repeatedly as a potential topic for future consultation sessions.

**We would like Task Force input to identify specific areas that could be covered in a consultation devoted to M&E issues.**

TF input today:

* # of indicators
* Indicators for the new FFP strategy
* Need a clear timeline for approval of M&E plan.
* USAID now requests to approve M&E tools—need timely feedback
* Multiple rounds of feedback, with different feedback in each round
* Delayed start-up of M&E workshops. Needs to be within 3 months of award.
* Delayed approval of documents that come out of start-up workshop.
* Delayed delivery of baseline reports.
* Are quality standards articulated well enough to ensure quality products?
* Can we get baseline values for some annual monitoring indicators from the project baseline, specifically outcome monitoring indicators for beneficiaries? (Using targeting criteria to identify potential beneficiaries in the population, and then disaggregate the data for base values)
* Complexity of FFP indicators to measure (annual).
* What to do with indicators that already show achievement at baseline, with little room for improvement (e.g. 97%). Do projects need to collect the data to inform these indicators?

**Task force needs to fine tune the specific topics before we initiate a consultation specifically on M&E.**

**Follow up**

* Laurie to share three existing chapters of ME Manual that were previously reviewed by the Task Force and FFP.
* Laurie to share FFP draft M&E policy and guidance document from October 2015.
* Task Force Members (Nestor, TD, Mara, Marta, Wadud) committed to review FFP M&E policy and guidance document and identify where more practical guidance is needed. Need more TF members to volunteer to review and provide input.
* Laurie will create the Excel document for people to provide input on the Promising Practices and will check in with people every 2-3 weeks on progress. First draft abstracts to be submitted before the next TF meeting January 12, 2017.
* Pursue the possibility of having FFP endorse the TOPS TOC guide as recommended Technical and Operational Guidance, with understanding that curriculum is updated annually as we all learn more about TOC.

**Next meeting**

January 12, 2017

If members feel there is a conflict with a resilience workshop Jan 10 -12, we will meet on the 13th.