Learning, Measurement & Evaluation Guidebook

This guidebook was produced by Co-Impact.

Co-Impact brings together local changemakers and funders from around the world to make health, education, and economic systems stronger and more inclusive – creating impact that lasts. Our commitment to advancing gender equality and women's leadership is central to this goal. By focusing on systems, we work at the scale of the problem - dismantling the root causes of inequality that disadvantage hundreds of millions of women, girls and marginalized communities. Spanning five continents, our team identifies partners that will create lasting progress when supported with the resources to work at scale.
Pooling funding allows us to provide large, flexible grants and strategic support to locally-rooted partners in Africa, Asia, and Latin America who know their systems best.
Our partners' initiatives will benefit more than 600 million people, and we can go even further together. We aim to deploy over $1 billion by 2030 and achieve a world where everyone can lead fulfilling lives.

www.co-Impact.org
info@co-Impact.org

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Introduction

This Guidebook articulates Co-Impact's approach to learning, measurement, and evaluation (LME). It seeks to improve our practice and help program partners achieve more impactful systems change and intersectional gender justice.

The Guidebook is organized in two parts. The first part sets out the purpose, values and principles that inform our overall approach to LME, including how we seek to learn and contribute to global knowledge. The second part, written with our program partners in mind, clarifies key concepts and expectations. We seek to be clear about a limited number of requirements, in relation to helping partners develop a robust learning plan, tailored to context, that can help advance the partner's strategy. We do not believe measurement should be done to please the donor; instead, the most important function of LME is to serve the program partner.

This Guidebook has been compiled based on our experience and of many others in supporting inclusive system-change initiatives at scale. Our goal is to clarify our views, not prescribe; we provide what we hope are helpful inputs and suggestions. We thrive on working with curious, learning organizations driven to contribute to systemic change and inclusion, and we trust our program partners to use this Guidebook in ways that work for them.

As Co-Impact grows and evolves, we look forward to working with partners who bring different pathways to systemic change at scale, including some who may be in the earlier stages of their impact trajectory. We recognize that the particulars of LME requirements may need to be adjusted as new partners join, and that in order to remain helpful, our guidance will need to expand to be relevant to a range of strategies. That said, we expect that the basic values that underpin our approach to LME will remain the same.

The Guidebook serves two additional functions. We use it internally to clarify and align our own support to program partners to use LME to strengthen their practice. Second, we hope that it will be useful to funders and other practitioners, and in particular demonstrate that a measurement approach that trusts program partners and prioritizes their own learning helps to achieve powerful results.

Above all, we look forward to working closely with our partners on learning what works to achieve inclusive systems change and advance intersectional gender justice in the Global South. We are privileged to support their work, and to learn alongside them.

The guidebook has been informed by the insights and experience of our program partners, lessons from other organizations, and the Co-Impact team. It was authored by Varja Lipovsek and Rakesh Rajani, with significant inputs from Abe Grindle, Doris King and Yasmin Madan. As we continue to learn, we expect to update this document from time to time. Please share your comments, feedback, and suggestions with varja@co-impact.org

PART ONE:

Our Approach to Learning, Measurement and Evaluation

Transforming systems to be inclusive and to advance intersectional gender justice is a complex endeavor. Uncertainty and setbacks are common, and progress rarely follows a straight line.

The overall **purpose of LME** at Co-Impact is to help all of us – our program partners, other actors in the development ecosystem, and funders such as ourselves – to navigate towards these ambitious goals. There are many lessons but no blueprints, so we seek to foster a learning orientation across all our grants and among ourselves. We work with our program partners to design and implement but also to adapt; to articulate key assumptions and hypotheses and test whether these hold over time; to describe the trajectory of successes and challenges, and to measure whether we are achieving desired outcomes.

Through collective efforts across our Foundational Fund and the new Gender Fund[1], we seek to make a significant contribution to the following set of outcomes for people, systems, and organizations in the Global South:

People

- Improved gender-equitable outcomes in health, education, and economic opportunity for 100 million people in the Global South, particularly historically disadvantaged groups.
- Improved power and agency among women and girls, particularly from historically disadvantaged groups.
- Increased number of women leaders with influence and agency.

Systems

- Health, education, and economic opportunity programs are more just, inclusive (in terms of gender, class and race/ethnicity/caste), and effective.
- Law and economics domains have improved policies and practices for women's leadership.
- Improved social norms advance intersectional gender equality.
- Systems are more effective and responsive.

Organizations

- Stronger Global South-rooted, majority women-led organizations.
- Strengthened practitioner-oriented research and learning.

[1] For more information on the two Funds, see our Handbook

1. Why we invest in LME

First, we invest in LME to **strengthen the learning practice of program partners** so that they can more effectively contribute to achieving systems change and gender equality outcomes. We support program partners to generate hypotheses, data, evidence, and lessons to continuously improve design and implementation, and adapt to evolving contexts. The backbone of this approach is arriving at a set of people-, system- and organization-level outcomes that correspond to the program partner's vision and strategy. This, in turn, underpins the LME plans that our program partners develop and execute. That is why the bulk of this Guidebook is focused on key components of LME for program partners.

Second, we invest in LME to **contribute to regional and global evidence of what works** in supporting systemic change and making progress towards intersectional gender equality outcomes. We support program partners to synthesize evidence and lessons arising from their work and use these to build a solid evidence base. Additionally, we engage research partners to generate practitioner-relevant and action-driven research. We endeavor to make lessons and findings open and accessible and use them to inform public forums, policy and programs.

Third, we aim to **learn about our own support model and contribute lessons about effective philanthropy.** We look to synthesize lessons (successes and challenges) across contexts and themes. We explore the effectiveness of our support model and harvest ideas from program partners on how we can improve. We also seek to describe the effectiveness of collaborative philanthropy in increasing funding and spurring better practice for inclusive and sustainable systems change.

2. Values guiding our LME approach

We believe that measurement should be at the service of learning and doing; and that without meaningful measurement, learning and doing will be impeded. Our values seek to anchor us on purpose. Accordingly, we strive to:

- Be driven by the program partners' interest, curiosity, and desire to achieve impact.
- Be inclusive and supportive of approaches led by historically disadvantaged groups.
- Seek simplicity in our approach, including alignment with other funders.
- Be flexible, curious, adaptive, method agnostic.
- Prioritize quality and truthfulness, and learn from failure.
- Strive to be transparent and open; publishing designs, tools, data, and results.
- Inform and connect with global and regional expertise.

As a result, we do not

- Mandate any particular set of indicators or measures.
- Prioritize one type of method over another.
- Require unilateral evaluations of our program partners.
- Prioritize attribution over other effects.
- Expect to only see success.

Equity and measurement

Our commitment to intersectional gender justice extends to our LME approach. We believe that effective systems change requires a focus on human rights, equality, and inclusion – and needs to explicitly address discrimination and barriers on the basis of gender, and other socio-contextual issues such as race, caste, ethnicity, class, disability, and sexual identity. We therefore value rigor and quality in research, and resolutely subscribe to research principles based on equity and inclusion[2].

We are guided by practices such as feminist evaluation[3], participatory research[4], and utilization-focused evaluation[5]. Aligning with feminist approach to research, we seek our LME to be interdisciplinary, pay attention to the history and context of social phenomena, focus on power and relationships rather than just isolated individuals, and on the intersecting structures that govern the behaviors of systems and societies.

In practice, among other aspects, this includes supporting our partners to:

- Define and measure **outcomes related to power, agency and leadership** of women, girls, and other disadvantaged constituencies, in addition to people-level outcomes related to health, education, economic opportunity.
- **Listen to and give space** to historically underrepresented constituencies in the generation of knowledge, in the design of feedback mechanisms, in the interpretation of results and lessons, and to make knowledge outputs useful to people the initiative is meant to serve.
- Make **all knowledge open and available** to the public, including providing underlying research design and data. We encourage the use of Creative Commons licensing and publication of data in machine readable formats.
- **Disaggregate data** by sex and other contextually relevant markers of inequality, such as race and class, and analyze findings with an intersectional lens.

3. LME in practice

We endeavor to translate the purpose and values described above into specific practices in three ways:

3.1 Support our program partners

At core we support program partners to articulate a credible and cohesive **theory of change** that is based on a thorough **root cause and problem analysis** and applies an intersectional lens to **understand power and address inequalities.** This is the basis of the systems-change strategy developed by each partner, of which a core part is a right-fit learning, measurement, and evaluation (LME) framework.

We believe that a learning framework is most useful when it is **designed to fit** the context and overarching strategy of program partners, and when it addresses the **key components of a *robust* learning approach.** These include:

1. Long-term, feasible, and measurable outcomes at three levels: organization, system,

[2] See for example: Shifting the evaluation paradigm: The equitable evaluation framework
[3] See for example Women's Empowerment and Economic Development: A Feminist Critique of Storytelling Practices in "Randomista" Economics, by Naila Kabeer
[4] See for example Guidelines for fostering participation in research, by Oxfam
[5] See for example Developmental Evaluation, by Michael Quinn Patton

and people-level, disaggregated with an intersectional gender lens. Progress towards the outcomes and the outcomes themselves are tracked by the partner's LME systems. Partners select a sub-set of key measures for reporting to Co-Impact **(reporting dashboards and milestones)**. These form a central piece of the communication and learning between Co-Impact and program partners.

2. Nimble and useful **monitoring mechanisms**, with a focus on obtaining and acting on **constituency feedback**, with special attention to historically underrepresented constituencies.
3. A robust, **right-fit evaluation plan** that fits with the partner's strategic objectives and that generates evidence whether the initiative is achieving the intended effects (for whom, and at what cost). Partners also identify a focused set of **learning questions** that further their learning agenda.

All initiatives we support have ambitious goals to change systems to deliver better outcomes for people. A system that improves is a system that learns. Our partners explore ways to **engage with systemic actors**, especially government institutions, to develop and hone their own learning, including what data is collected and how it can be used to improve delivery and accountability.

Learning is like a muscle – it needs to be exercised and nourished to function well. As part of our overall organizational strengthening, we work with our program partners to develop and fortify **learning practices** across the organization and its staff to use the data and evidence to improve and to learn from failure as well as success; and to design a **realistic budget** for LME commensurate with their strategy and learning needs. The LME budget is included in the overall initiative budget that Co-Impact supports.

3.2 Contribute to evidence of "what works"

Decades of research has taught us that complex social change doesn't follow a prescribed blueprint. All transformative progress is rooted in history, power, and politics, and we seek to synthesize lessons about effective contextual practices on how to make systems more inclusive and effective, sustainably, and at scale.

To this end, we work with our partners to articulate specific **evaluation, research and learning questions**, build on existing knowledge, and generate evidence relevant to practitioners as well as to the broader field. The substance is generated by our program partners, through their strategy and related measurement and evaluation.

In addition, we support a few practitioner-oriented research entities, with the aim of complementing practice with grounded, relevant evidence and data. To help bring contextual lessons to proximate as well as global audiences, we collaborate with our program and research partners and invest in **curating, synthesizing, and actively sharing** evidence and lessons across relevant themes – across sectors, domains, geographic areas, and population groups. We promote (and if helpful, curate) thoughtful, deliberate **connections between practitioners and research entities**, guided by the interest and requests expressed by the program partners.

3.3 Learn about our effectiveness as a funder

Co-Impact's model of collaborative philanthropy for systems change and our influence agenda are core to our vision of success. We pledge to engage with, use, and care about evidence in ways that are rigorous and focused on improving practice, which includes **accepting that failure is a key element of learning**. To understand how we are doing in relation to this goal, we **source feedback from our program partners** on our processes and our functions, including independent assessments of our role as funders. We use the feedback to improve our practice. We also collaborate with other funders on joint learning projects and/or with independent researchers. Finally, we seek to develop light-touch but meaningful practices that will help us to assess whether and how we are, over time, contributing to the discourse and improved practices in the wider philanthropy field.

PART TWO:
LME Guidance for our program partners

1. Three levels of outcomes

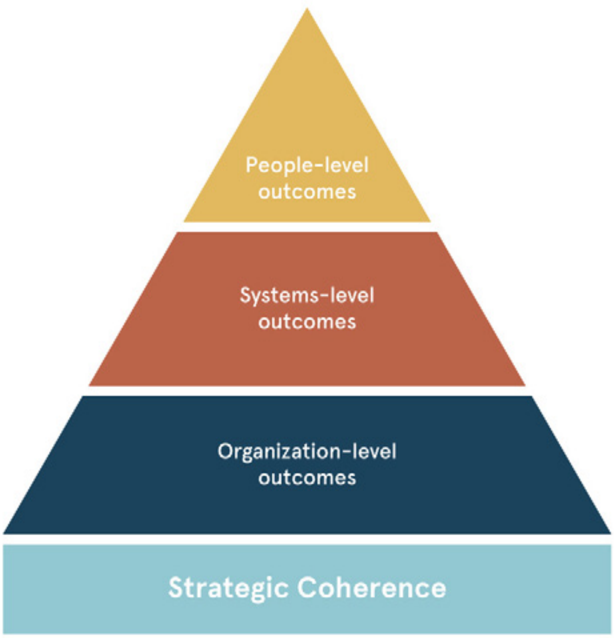
1.1 Purpose

We understand that systems change is complex, does not follow a linear path, and that strategies often need to be adapted along the way. Supporting program partners to define outcomes (usually for 5+ years) is meant to clarify the vision and articulate the goals towards which they are working; it does not set the strategy in stone. Clear outcomes enable our partners to review progress, challenges, shifts in key contextual parameters, and identify adjustments needed to maximize the likelihood of achieving their goals.

We support our program partners to develop and measure outcomes that capture the changes they seek, at three levels:

- the **people** meant to be served by the initiative,
- the **systems** that deliver the initiative, and
- the partner **organization** itself.

The three levels are linked: program partners arrive at the outcomes after conducting deep problem analysis, focusing on *why* the problems identified persist, *what must change in the system* if the problems are to be addressed sustainably and at scale, and how their organization needs to adapt to play an effective role.



1.2 Guidance on three levels of outcomes

People-level outcomes articulate the concrete, measurable and gender equitable improvements in the lives of all people, especially disadvantaged women and girls.

People-level outcomes are disaggregated by sex/gender and, to the extent feasible, by other relevant contextual markers of inequality, (e.g., wealth quintiles, caste/race, rural/urban, etc.).

The specific choice of outcome depends on the context, problem, and strategy; and we look forward to engaging our program partners on how they are thinking about:

- **Gender-equitable outcomes within their core sector** for all people across the gender spectrum.
- Increased **women's leadership at different levels** (household, community, and the highest national institutions).
- Improved **power and agency** among women and girls, and other disadvantaged groups:
    - Increased ability to make and act on decisions
    - Increased bargaining power
    - Increased control over resources (health-related, educational, economic)

We expect that program partners will use **well established measures** to track people-level changes in health, education, economic opportunity, and agency (e.g., mortality and morbidity; literacy and numeracy, and primary school completion; household assets, individual savings; agency and decision-making; etc.) as well as other measures that are relevant to their key goals.

Selected measures of **reach or coverage** can complement the people-level outcomes. While not the same as outcomes, coverage data are important intermediate measures that can be tracked with relative frequency, can be used for learning and adaptation of the program, and yield useful information on whether the initiative is reaching the populations.

System-level outcomes are the important, concrete, and achievable changes needed in the system, which if implemented, will result in the system producing better outcomes for people, at scale; and will continue to do so reliably into the foreseeable future. The outcomes are selected by program partners based on their root cause problem and political economy analysis, and resultant strategy focusing on ***selected systemic levers or components***[6].

Given the context-specific nature of this work, these outcomes vary across initiatives, but usually they consist of concrete improvements in selected key elements or functions of the system. Each program partner defines the outcomes most relevant to their own context and strategy, covering one or more of the following (illustrative) elements:

- The **frameworks:** policy/laws/regulations/mandates governing the decisions and actions of key actors, programs, resources and **financial resources** and mechanisms, decision-making, and leverage of key actors to allocate and use resources.

[6] There is a wealth of useful information available on how to think about systems; we encourage our partners to use an approach that fits their strategy. We draw on several resources, including: Leverage points – places to intervene in a system, by Donella Meadows; The water of systems change, by John Kania; Making markets work for the poor, by DFID.

- The **key actors** that are given (or claim) power, influence, and input on the system; structures for doing so; their inclusiveness and representativeness, and the **people** working in the system/human resources: numbers, representation, reach, allocation; functions, mandates, capacities, supervision & support.
- The **design** of programs/models/services supported by these human & financial resources, including what they are, who is eligible and served, in what ways / to what degree, etc.
- The **data** / information available to key actors to make decisions, data infrastructure, information flows, and actual use of the data; and the formal & informal **incentives and accountability mechanisms** that monitor, motivate, incentivize (or sanction) people across the system.
- The **norms** and common practices that shape narratives and assumptions, influence how things work and sometimes override formal rules.

Organization-level outcomes are developed by program partners based on their identification of critical capabilities that need to be strengthened in the organization. We expect these outcomes will be updated during the systems change grant, as the organization evolves. In developing organizational outcomes, we are keen to discuss the following with our partners:

- **Leadership:** characteristics of effectiveness, deep bench of leadership; diversity; board & governance; strategy.
- **Organizational arrangements:** management of people, finance, knowledge, program.
- **Partnerships:** that are essential to achieve change.
- **Funder relationships:** diversity and strength, alignment with core purpose, policies.
- **Values and culture:** outcome orientation, gender & intersectionality, listening & learning.

For more information please see our Guidebook on Organizational Strengthening.

2. Dashboards

2.1 Purpose

In complex systems-change work, clear measurement helps track progress and inform learning. We work with our program partners to develop measures and indicators that are best suited to see how things are going, learn and adapt. The full set of measures as well as the processes by which the program partner collects and uses the information, is the partner's own **management dashboard**, and part of their overall LME agenda. The level of detail and disaggregation (e.g., by levels of system, or geographic areas) is determined by the partner's learning and management needs.

A secondary but important function of measurement overall is to inform the communication and learning between program partners and Co-Impact (and other funders). The program partner and funders agree on a subset of these measures for a **reporting dashboard**, which forms a core part of reporting and the grant agreement. We seek to minimize reporting burdens for program partners and expect that all indicators in the reporting dashboard will be derived from the program partner's own management dashboard.

We seek to relate to our program partners on the basis of trust and candor. We understand that working with systems is complex and unpredictable. The reporting dashboards and accompanying narrative reports are intended to be aides in the discussion of progress, challenges, and as the initiative develops, helpful adjustments. We believe that such trust and candor is essential to achieving powerful results.

This open communication sometimes includes discussing major changes in the context or program approach, and a subsequent need to adapt pathways to change and corresponding measures (and indicators) towards achieving the envisioned goals. In such circumstances we seek to learn from our program partners and adapt the dashboards as needed through mutual agreement.

2.2 Guidance on developing dashboards

The **reporting dashboard** is composed of a limited number of outcome indicators covering people-level, system-level, and organization-level changes. It is intended to be a succinct, birds-eye view of the trajectory and progress achieved by the initiative over time. We request partners to include a narrative accompanying the dashboard to contextualize and explain the rationale for the indicators, as well as changes observed in the indicators. The dashboards are part of reports shared by program partners and are complemented by implementation milestones (explained further below).

We do not require our program partners to adopt any specific indicator, as we believe that the most useful measures are those that are most closely tied to a given strategy and its intended effects. However, we do encourage partners to consider using well established, recognized indicators when this fits with partners' needs and interests. This is particularly relevant for partners who wish to align with broader research or advocacy agendas and communicate results to national or global audiences.

What's in the reporting dashboards?

Drawing from the detailed measurement plans developed by each partner, the **reporting dashboard is a selected subset** of key measures. We support our partners to arrive at a complete reporting dashboard at the start of the grant agreement; however, in some cases, partners may need to develop outcomes or related measures during the first year of the agreement. As noted previously, outcomes help us to have a common basis for learning and discussion on progress and challenges, and any adjustments needed.

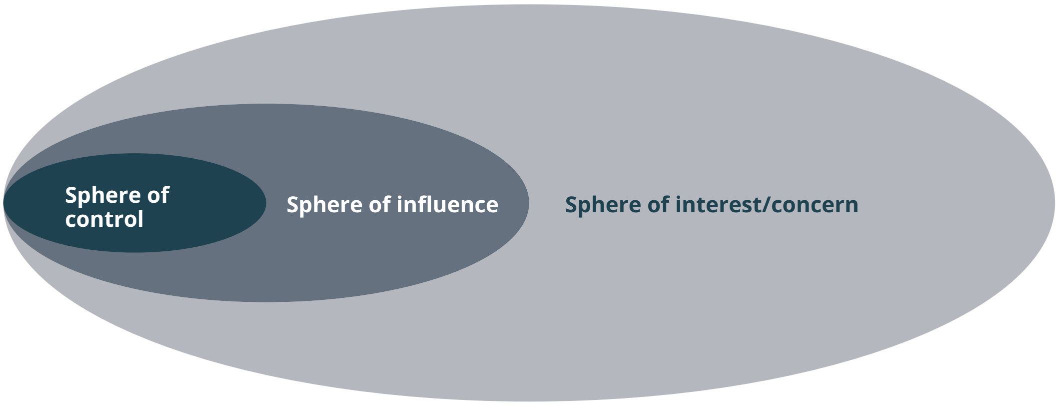
- The reporting dashboards, organized in 3 categories of people-level, system-level, and organization-level outcomes, typically contain a total of 10-15 measures. In the grant agreement, we request partners to report on progress twice per year, which includes updating the dashboards with available information.

- Each selected outcome – whether numeric or descriptive – has a relevant **baseline measure**. Partners are encouraged to use existing data sources where reliable and relevant, and otherwise to consider cost-effective ways to generate meaningful baseline information.
- Each outcome has periodic targets spread over the time frame of the agreement; partners report actual measurement or status against the targets. The **frequency of measurement** depends on the nature of the outcome and the measurement plan; we encourage tracking of **long-term** as well as **intermediate outcomes**. These can be quite varied and need to be developed tailored to each initiative.
  - For example, in health initiatives, morbidity or mortality outcomes are often measured in 5-year intervals. On the other hand, the coverage of the population receiving a certain health intervention, or accessing a health service, can be measured annually. In this case, access is considered an intermediate outcome, while the eventual measure of (and ideally reduction in) morbidity or mortality is considered the longer-term outcome.
  - In contrast, people-level economic outcomes, such as income or savings, are often measured annually, or every two years. Similarly, learning outcomes (e.g., basic literacy and numeracy) can be measured annually for each school cohort.
  - System-level outcomes, such as adoption of a policy or change of budgeting structure, take time. We work with program partners to unpack and identify key steps along the way that serve as intermediate measures of progress towards long term goals.

Milestones

Alongside measures of ***outcomes***, we work with our program partners to develop annual ***milestones***. Milestones are linked to the implementation strategy and set as ***minimal markers of progress***; failing to reach them would be an indicator of significant difficulties along the path to achieve results. As such, milestones are an excellent early warning signal that prompt discussion about the reviewing the approach and making necessary adjustments.

As with outcomes, milestones are tailored to each initiative and strategy. There are no definite rules about what makes a reasonable milestone but typically they include aspects over which partners have direct control, and through which they aim to influence systemic actors and levers within the system. Milestones reflect progress on key strategic components (sphere of control) as well as the response of system actors to those activities (sphere of influence). The figure below, adapted from the Outcome Mapping approach, usefully illustrates this distinction.



3. Evaluation

3.1 Purpose

Evaluation is a core component of our program partner's overall LME agenda. We support our partners to develop and implement a robust, right-fit evaluation plan that will meaningfully inform their practice and be a useful input to the systems targeted by the initiative, as well as contribute to the wider pool of knowledge.

By *robust* evaluation, we mean a critical and constructive inquiry which generates high-quality, reliable, useful information on how, under what circumstances and why (or why not) a particular strategy is achieving its intended effects and contributing to the envisioned change. By *right-fit* evaluation we mean that the scope, questions, and methods are tailored to the initiative and context. We do not prioritize any particular method. We do place a premium on credible evidence, and we believe that the most credible evidence will be produced by methods most appropriate to the question that was asked.

As a matter of principle, evaluations are owned and managed by the program partners in ways that further their own strategic objectives. They are not conducted or commissioned by Co-Impact, and do not serve to "test" our program partners. Accordingly, we see the primary audience for the evaluation is the program partner and the system actors seeking to learn what works, how, and why, and donors such as Co-Impact as the secondary audience. The overall objective is for the evaluation results to be **useful to the system and to the organization**: to inform policy decisions, resource allocations, political prioritization of initiatives, accountability mechanisms, etc. – in essence, the elements that will enable the system to deliver better and more inclusive outcomes.

Learning questions

Learning questions are related to but distinct from evaluations. Evaluation is tied to a specific theory of action or strategy; it seeks to generate evidence of the pathways in the strategy, to examine the links between the strategy and the intended outcomes, and to capture changes in the outcomes. Learning questions can be more **open, exploratory, testing assumptions or hypotheses** that arise from the implementation and context. We encourage our program partners to develop learning questions that further their own knowledge and practice, as well as of the system-level actors. Ideally, the evidence generated through research around learning questions also contributes to the broader evidence base. We support our partners to include learning questions as part of their overall LME agendas. Our partners decide whether and which external entities – such as research groups, academics, think tanks or others – they wish to engage with for this work.

3.2 Guidance on evaluations

We believe that all elements of a learning agenda, including evaluation, should be fit for purpose. Below ***we offer some thoughts that may be useful*** to our program partners as they develop their evaluation approaches:

Evaluation and equity. We encourage partners to consider and meaningfully address questions of voice and power in all evaluation exercises, particularly how women, girls, and other groups disadvantaged on the basis of race, caste, ethnicity, class, and other intersectional markers of discrimination participate in, and benefit from, the evaluation. For example:

- Who decides what questions (and which outcomes) are prioritized for evaluation?
- What mix of methods will be used? The tools through which knowledge is generated can play into existing inequalities or can be platforms for inclusion.
- How will the evaluation reflect the experiences of women, girls, and other disadvantaged groups in ways that are ethical and respectful? Not only in the generation of data, but also in the interpretation of results and lessons.
- How can the evaluation serve as a resource to the constituencies that are "studied" and those who have created the knowledge?

Sharing knowledge deliberately. To expand the pool of knowledge and information, we encourage our partners to build into their plans distinct efforts to share data, results, and insights with the people the initiative is meant to benefit. For more on ***constituent feedback***, see section 4 of this Guidebook. Furthermore, to contribute knowledge to the broader field, we expect that our program partners will publicly share evaluation methodology, data, and results.

Process evaluation. Internal monitoring provides valuable information but at times a focused evaluative exercise of a particular implementation component can be helpful. The point is to gather and use timely information to improve practice. In this, we highly encourage program partners to link ***constituent feedback*** mechanisms with process evaluations and reflection on practice, paying particular attention to the voices of women, girls and other groups disadvantaged on the basis of race, caste, ethnicity, class, sexual identity and other intersectional factors.

Evaluating outcomes. We ask partners leading system change initiatives to consider how they will know whether their work is achieving (or significantly contributing to) the core people-, system-, and organization-level outcomes. In particular, evaluation designs may examine whether changes in people-level outcomes can be plausibly linked to system level changes. Specifically:

- Program partners may want to demonstrate that the particular initiative or strategy results in positive changes in people's lives, particularly when it is implemented through a public or market system. In these cases, we encourage partners to conduct or commission **rigorous impact evaluation of people-level outcomes** that seek to link these outcomes to changes in the system (rather than, for example, direct service delivery by an NGO).
- It is often helpful to ask an **independent party** to conduct the impact evaluation, as they bring specialized skills and expertise that may not be housed within the program partner. Independent actors can also bring fresh and different perspectives and help confer credibility to the findings. That said, we find that it is often helpful when evaluations are co-designed by program partners together with independent evaluation teams and affected constituencies in ways that bring together the contextual and thematic knowledge, technical research expertise and lived experience.
- Credible evaluations often include **comparisons and alternate hypotheses**, irrespective of the methodology used. These may include quantitative measures of outcomes in the absence of the initiative (i.e., counterfactuals) as well as qualitative considerations for the changes observed. We encourage our program partners to choose evaluation designs that explore alternate explanations for change and seek to provide clear and compelling evidence-informed bases for conclusions that are made.
- We recognize that evaluations often require **diverse approaches and methods** to capture quantitative and qualitative changes. We also encourage our partners to describe their ***contribution*** to change, rather than seek to isolate **attribution**. We encourage partners to consider a range of hypotheses of why a particular change is observed, and within those, seek to plausibly outline program partners' role (contribution) in bringing about the change, while explicitly recognizing the contributions of other actors and forces in the system.
- Evaluation thinking – that is, inquisitiveness, desire to link strategy to results – can be applied to **organization-level outcomes** as well. Building on our Organizational Strengthening guidelines, we encourage our partners to design a light, fit-for-purpose approach to evaluate whether the organization-level outcomes they have envisioned are being achieved, and whether they are helping the organization become a more effective system-level actor.

Evaluating costs. We recognize that the cost (effectiveness) of an initiative is a critical factor in its feasibility and sustainability. This is especially true for public systems which operate at large scale with constrained budgets. We therefore encourage program partners to carefully track and assess various cost components of the initiative, with the purpose of understanding the **cost implications** for the system to improve its functioning over the long term.

That said, we do not conflate being mindful of costs with cost efficiency (achieving maximum benefit for the lowest cost). Keeping costs manageable is a key consideration, which needs to be balanced with the cost of correcting for historical exclusion to ensure inclusion, rights and equity. For example, advancing women from disadvantaged constituencies into leadership may be more costly than advancing men or privileged women, because of need to challenge discriminatory norms and dismantle historical barriers. We encourage program partners to make these sorts of considerations an explicit part of their cost calculations.

4. Constituency Feedback

4.1 Purpose

We see feedback mechanisms as an essential part of the partners' overall LME portfolio, contributing meaningful information for monitoring, process evaluation, and adaptation of the initiative. There is emerging evidence that listening and responding to constituent feedback is linked to better outcomes in politics, education, health, and community infrastructure[7]. Effective feedback systems enable people to voice priorities, offer advice and ideas, and communicate how they are experiencing a given initiative. When feedback mechanisms exist within public systems, they form a core component of government accountability.

We support our program partners to apply the principles of listening, augmenting voices, and creating opportunities for feedback and participation in their initiatives - particularly from people the initiative is meant to serve, as well as from actors in the system responsible for delivering the initiative.

What does a high-quality feedback loop look like?

We believe that for feedback systems to thrive, they need to:

- Employ simple yet flexible data collection approaches.
- Capture a large number of representative constituent voices and gather credible, candid feedback.
- Identify areas for celebration and areas for improvement, while shedding light on differential experiences across specific constituent groups.
- Engage organizational decision-makers (and other stakeholders) to learn from constituent feedback and implement changes based on what is learned.
- Close the loop by sharing back with constituents what was learned from listening to them and the specific ways that an organization is responding to feedback.

Adapted from Listen for Good, accessed on May 5, 2019
www.fundforsharedinsight.org/listen4good

[7] See for example https://feedbacklabs.org/wp-content/uploads/2019/11/Feedback-Smart-Takeaways.pdf

4.2 Guidance on constituency feedback

Feedback is one form in which people meant to benefit from the initiative can also participate in it. Participation can range from passive (just eliciting feedback), to responsive (consulting, acting on feedback), to active participation (shared decision-making). Carefully thinking through how the initiative will engage with, listen to, and involve people is important for everyone that is meant to benefit from systems change initiatives, but especially so for women, girls, and other disadvantaged groups whose priorities and ideas often go unheard.

We do not require any particular form or method of feedback mechanisms. Instead we ask program partners to meaningfully engage with these questions and make reasonable efforts to put in place (or support existing) relevant high-quality feedback processes in ways that work with their strategic development and enhance the agency of the constituents, particularly marginalized groups. Accordingly, we support program partners to think through feedback as part of the initiative's core learning practice at the level of the organization and of the system.

Using feedback to improve our practice

Co-Impact elicits - and acts on - feedback from our own constituents on a regular basis. Periodically, we engage independent entities, such as the Center for Effective Philanthropy, to conduct confidential surveys with applicants and program partners. We use the findings to inform revisions and improvements in our practices as a funder, and to communicate to our partners about what we are learning. Many of the changes we have made as a result of feedback are then communicated in our Handbook.

At the organizational level:

We support program partners to develop (or hone) relevant, high-quality feedback mechanisms that generate useful data and information, and to meaningfully use that data to improve their approach. In recent years, many innovations in feedback processes have been developed, and we can support partners to draw on that experience and tailor it to their own contexts and needs.

In particular, we are keen to learn how our program partners can gain feedback ***from people the initiative aims to benefit*** in a systematic and meaningful manner, and respond to that feedback substantively and meaningfully. This is the case for all people meant to benefit from systems change initiatives, and especially for women, young people, and other disadvantaged and underrepresented groups.

Additionally, we support our partners to implement mechanisms for feedback ***from the key actors in the system*** in a systematic and meaningful manner, to respond to that feedback according to good practice, and to strive to create meaningful opportunities for participation.

It is particularly relevant to elicit and act on feedback from **front-line service providers** such as teachers and nurses, who are the "human faces" of the system. Furthermore, **bureaucrats or civil servants** within government systems, especially at sub-national levels, are often neglected as a group – even though their actions and how they experience the initiative is critical to making it work. We encourage program partners to look at these two groups through the gender and intersectional lens as well, so as to better understand how power is manifested across local and national government practice.

At the system level:

We support our partners to engage with the ideas of developing and supporting feedback mechanisms within the system itself, and between the system and its constituents. In relation to government actors, the questions of accountability become central. Feedback serves not only as a means for "clients" to inform service providers, but as an integral component of how citizens can participate in key areas of governance, and how they can hold their leaders accountable.

Some of the questions we encourage our program partners to explore are:

- How does a government agency or institution **currently listen** to the experiences of the people it serves, and how does it use the feedback to improve services? Are experiences of women, girls, and other disadvantaged groups clearly heard through the feedback?
- Does the government agency or institution **circle back to constituents** to confirm they have been heard, and with the eventual results of the feedback? Does it open spaces for deliberation in addition to information?
- Is the **feedback mechanism credible** to citizens as well as civil servants? For example, is the data tied to accountability processes to be used citizens, such as grievance and redress? Is the feedback mechanism a credible sanction or motivation to civil servants and front-line providers – for instance, tied to performance assessment, recognition and promotion?
- What is the current **state of "appetite"** within the government actor to develop this further, and what may be entry points? Who within the system stands to gain from an enhanced feedback and accountability structure, and who stands to lose? How can these motivations be harnessed, and barriers be addressed?

In scaled systems, feedback and accountability mechanisms usually need to be enabled by information and communication technology (ICT) in order to manage the scale of the system and potential volume of data. There is now a wealth of experience and evidence in implementing ICT-enabled feedback platforms. Along the success stories, there are important lessons about the limits of technology. For example, technology by itself cannot correct for deeply entrenched disbalance of power, lack of trust between citizens and government, or low motivation of civil servants[8]. Moreover, technology can exacerbate existing inequalities – e.g., women and girls in many contexts have less access to technology than men and boys[9].

[8] See for example: When Does ICT-Enabled Citizen Voice Lead to Government Responsiveness? By Tiago Peixoto and Jonathan Fox.
[9] See for example: Appropriating technology for accountability: messages from Making All Voices Count, by Rosie McGee and Duncan Edwards.

We believe that program partners are best placed to maneuver the exploration of these questions within their coalitions and the systems they engage with. Our role is to be supportive, ask questions, suggest available evidence and tools, and connect partners to research partners.