Resource type	Example	Date created	2017 & 2019	Last reviewed	2022

Resource series	Seeding innovation, evidence, and grantee-led learning in the economic justice field

Project	Monitoring, Evaluation and Learning Toolkit for Grantmakers and Grantees

▌MANAGE an evaluation or evaluation system

MEL jamboree facilitator agendas

Thursday 30 November – Friday 1 December 2017

Day 1 (2017)				
Time	**Session**	**Objective**	**Session flow (what will happen)**	**Materials**
08:30-09:00	Arrivals & light breakfast	Mingling!	Getting to know people over coffee	Coffee & light breakfast
09:00-10:30	Welcome & introductions Workshop objectives & agenda	Welcome Introductions Agenda overview Setting the tone Overview of MEL developments at OSF	**Official welcome** (15 min) **Setting the tone:** Create environment for open exchange and learning. Key message at this point! **Introduction exercise:** Who's in the room? People talk in pairs ("Find someone you don't know!") and then introduce that partner to someone else (Name, organization/function, one topic not on the agenda that you/they would like to connect with people about) (30 min) **Agenda overview** (5 min)	Agenda hand-outs Flip charts PPT for OSF MEL overview presentation

Day 1 (2017)

Time	Session	Objective	Session flow (what will happen)	Materials
			Set tone for participation/interaction	
			Ask for volunteer to run post lunch energizer on Day 2	
			Joint commitments: Ask people which commitment we should jointly make as a group for the workshop and write on flip-chart (e.g., use of phone, listening, open mindedness, Chatham House rules) (5 min)	
			What's happening with MEL at OSF? Overview presentation and Q&A [Many people asked for an input from OSF and what MEL developments are and expectations vis-à-vis grantees] (10–15-min overview, 15 min Q&A)	
10:30-10:45	Break			
10:45-12:30	Institutionalizing M&E	How to set up M&E for institutionalizing it in a sustainable way – from design, to monitoring, to evaluations	**Framing:** Next two sessions—institutionalizing M&E and institutionalizing learning (3 min) **Kick-off:** Reflections on institutionalizing M&E (5–10 min) **Presentation** of data collection example (10 min) • Presentation of the system, how it is helping ORGANIZATION collect data, how it is used within the organization and a quick overview of the challenges experienced **Group discussion:** Small *parallel* groups to discuss three key challenges with institutionalizing M&E (30 min): • Integration of evaluative thinking into program design	

Day 1 (2017)				
Time	**Session**	**Objective**	**Session flow (what will happen)**	**Materials**
			• How to set up monitoring systems conducive to monitor long-term change	
			• How to use M&E for adaptive programming.	
			• Small group on ORGANIZATION monitoring system	
			30-minute debrief in plenary on key points from the groups.	
12:30-13:30	Lunch			
13:30-15:00	Institutionalizing learning	Discuss practical ways on how to create a learning culture in organizations	**Energizer:** "Pick a physical item in the room that represents your learning style" (e.g., a book, the agenda, a person). If no suitable item is available, draw it or use playdoh, pipe cleaners etc. **PARTICIPANT input:** Institutionalizing learning, different types of learning practices, and how learning needs to be informed by monitoring, evaluation, and research (10 min) PARTICIPANT to focus on challenges and opportunities/progress related to: • Enabling environment for MEL (funding, leadership, org. culture, etc.) • Going beyond isolated MEL instruments for compliance to organizational learning (critical reflection, exploring change processes) • Linking MEL to decision making, planning, strategy (informing TOCs, aligning timing, producing actionable information, etc.)	PowerPoint Flip charts

Day 1 (2017)

Time	Session	Objective	Session flow (what will happen)	Materials
			Group discussion: Small groups to discuss three key challenges with institutionalizing learning (30 min): • How to create institutional buy-in and conducive environment to promote a culture of learning • What are the most conducive organizational set-ups to promote a learning culture? • How to get donors and local partners on board? **Debrief and plenary discussion** (30 min)	
15:00-15:15	Break			
15:15-17:00	Long-term systems change: Political Economies - complexity management and MEL	Discussing experiences to include the wider (political) context into MEL work	**Framing of session** **Energizer/kick-off:** Systems "Love" Video (5 min) **Panel set-up:** Participants share experiences on how complexity aware methodologies have been integrated into MEL, including related tools. • Each panelist to speak max. 10 mins. each (max. 30 min) • FACILITATOR to facilitate panel discussion and Q&A • Debrief and discussion in plenary (30 min) Concluding with the question on "What's missing/still needed?" **PANELIST 1**: ORGANIZATION's approach to Learning to Make All Voices Count project:	Panel set-up at front Flip chart PowerPoint Index cards

Day 1 (2017)				
Time	**Session**	**Objective**	**Session flow (what will happen)**	**Materials**
			• Components of good MEL in complex, political systems	
			• Participatory, built on problems, alive to power and politics, integrated with strategy	
			• Data to support learning and action by local partners/stakeholders	
			• Inputs for regular reflection and adjustments	
			• Practical example from the project	
			PANELIST 2: Share practical example, including:	
			• Definitions	
			• A case of simple & complex program results chain	
			• The six steps of Outcome Harvesting	
			• Relationship between theory of change and Outcome Harvesting for learning	
			• Strength of Outcome Harvesting	
			• Limitation & challenges to Outcome Harvesting	
			PANELIST 3: Share information on:	
			• How data do impact democracy: the Liberia scenario, 2017 elections	
			• Sentinel indicators in Liberia in the accountability and transparency space	

Day 1 (2017)

Time	Session	Objective	Session flow (what will happen)	Materials
			• Lessons on how organizations are learning in Liberia based on our recent research	
			Day 1 feedback: Everyone to write down (on an index card) one thing that they really liked (one side of the card) and one thing they would do differently on Day 2 (reverse of the card).	

Day 2 (2017)

Time	Session	Objective	Session flow (what will happen)	Materials
08:30-09:00	Arrivals & light breakfast	Mingling!	Getting to know people over coffee	Coffee & light breakfast
09:00-10:30	Interactive MEL quiz (30 min) Learning & research (1 hr)	Warm up for the day	**Interactive MEL quiz** (30 min) **Group work:** People to work in (five) groups of 5 to illustrate one element of MEL artistically using playdoh, pipe cleaners, flip charts (e.g., a graphic illustration of theory of change) without revealing what it is in writing/verbally. Afterwards, gallery walk with people guessing what each illustration means. **PARTICIPANT input:** Initial framing reflections (10 min), incl:	Playdoh Pipe cleaners Flip Charts

Day 2 (2017)				
Time	**Session**	**Objective**	**Session flow (what will happen)**	**Materials**
			• Learning as a product and process (action research and how to use it with different stakeholders) • How to link research to M&E and how to measure the impact of research • How to institutionalize an evidence-based learning culture **PARTICIPANT input:** Experiences from ORGANIZATION (10 min) Group work at tables: • How is your organization using research for MEL purposes? • What is missing and/or still needed?	
10:30-10:45	Break			
10:45-12:30	Conducting, commissioning, managing and using evaluations	Share experiences on how to conduct, manage and use evaluations and common challenges – clinic! Live problem solving	**Kick-off "game":** Key considerations for successful evaluations (15 mins): Ask participants to write one key consideration for a successful evaluation on a card/sticky post-in and pin on wall **PARTICIPANT input:** Experiences of conducting, managing, and/or using (external) evaluations (10 min each), focusing on common challenges and how to overcome them: • Evaluation use: How is evaluation going to be used, when, and by whom; how will your org/team engage with evaluators; how might "negative" findings be received or handled at your organization?	Cards/Post-its PowerPoint Flip charts

Day 2 (2017)				
Time	**Session**	**Objective**	**Session flow (what will happen)**	**Materials**
			• Evaluation purpose: What is the evaluation going to cover/evaluation questions! – design flows from this; how many evaluation questions can you have?	
			• Evaluation planning: Never too early to start planning – and budgeting! – for evaluation; perhaps a bit on identifying the "right" evaluator	
			Clinic: Participant experiences of conducting, commissioning, and using evaluations: practical brainstorming (45 min)	
			Wrap-up in plenary (15 min)	
12:30-13:30	**Lunch**			
13:30-15:00	Monitoring & data collection	Indicator clinic! An opportunity to do live problem solving	**Energizer:** Quick post-lunch energizer run by willing participant who volunteered on Day 1 (10 min)	PowerPoint Flip charts
			PARTICIPANT input: Monitoring & indicators (10 min)	
			Indicator clinic: Particular challenges and experiences with indicators, discuss participant examples (45 min)	
			Wrap-up in plenary (15 min)	
15:00-15:15	**Break**			
15:15-17:00	Next Steps Personal Commitment	Lay the foundation for a network	Learning communities people use	PowerPoint Flip charts Post-its
			Next steps:	
			• How will we stay connected?	

Day 2 (2017)				
Time	**Session**	**Objective**	**Session flow (what will happen)**	**Materials**
	Workshop evaluation	amongst participants	• Personal commitments: Every participant to write down at least 1 commitment for after the workshop to keep the energy alive (blog, debrief colleagues etc.) **Workshop evaluation** **Close:** Aim to end at 16:30!	Evaluation forms

Ideas for grouping people for the small group work (depending on session):

- Small or large organizations
- Organizations with official MEL staff (i.e. their *only* job) vs those without
- Geographical focus (though we will be biased towards US, global, Africa)

- Organization type (coalition, implementing, research, other)
- Organizations on a spectrum of learning (from KM self-assessment to create a few "buckets" of types)

Thursday 29 April – Friday 30 April 2019

Day 1 (2019)				
Time	**Session**	**Objective**	**Session flow (what will happen)**	**Materials**
08:30-09:00	Arrivals/breakfast	Mingle		Light breakfast
09:00-10:30	Welcome from OSF, including the objectives of the workshop and an update on OSF's Economic Justice Program Introductions of participants Agenda overview Joint commitments & jointly managing group dynamics Logistics update What has happened since the first MEL Jamboree in 2017?	Welcome & introductions Setting the tone & "ground rules" Program overview Highlights since the last Jamboree – get MEL juices flowing	**Welcome remarks:** OSF & overview of changes at OSF & Introduction of facilitation team (15 min) **Introductions** (FACILITATOR to facilitate): People find a partner who they do not know or do not well, then introduce them to someone else, covering their name, where they live (country/city) and their function in relation to MEL (30 min) **Overview** (15 min): • Agenda, including a heads-up about the two clinics on Day 2; ask people to provide input for these during lunch today (note on flip charts) • Joint commitments and managing group dynamics • Volunteers for energizers? • Put up follow-up commitments (blogs etc.) on wall **Logistics:** Update about logistics, group dinner etc. – any practical pr logistical questions (3 min) **Group discussion** at tables (10–15 mins) • What MEL issues are you currently working on that you are excited about?	PowerPoint Agenda handouts Flip charts

			• In which MEL related area(s) has your org made progress over the past year? **Debrief**: 2–3 highlights from each table (15 min)	
10:30-10:45	**Break**			
10:45-12:30	**Learning and collaboration** Many organizations face the same challenges around organizational learning: how can collaboration around learning help to address these challenges?	Sharing learning around organizational learning & collaboration around learning	**Inputs from** organizations involved in learning exchanges (10 min max for each group). Key questions: • What incentivizes collaboration and joint learning within and across organizations? • Are there common learning questions in the economic justice and fiscal governance fields? • What is the potential to answer them collectively through formal or informal approaches? **Q&A after each group input** **Facilitated plenary discussion** If time allows, ask people to brainstorm (at tables) ideas about possible areas for collaboration going forward	4 chairs at front People to rotate in and out from there for their inputs PPT based on need
12:30-13:30	**Lunch**			
1:30 – 3:15	**Fiscal Governance Indicators Project**	To provide new and practically relevant information about existing measurement tools and indicators they can employ in	**Energizer:** Volunteer participant **Intro from DONOR:** Context for the project and allay concerns about this being about imposing indicators on people Session on what we know so far, which PARTICIPANT will present as well as facilitate the group activity	Need 5 chairs at front PPT PARTICIPANT will bring handouts

		their work (based on evidence review)	Small group sessions on feedback on the potential outcomes. PARTICIPANTS to facilitate small groups. If this does not end up working out, we have a back-up plan to reconfigure into 3 small groups, so we have a contingency in place to allow us to still cover facilitation.	
		To get feedback on priorities to target and pitfalls to avoid in the development of new fiscal governance indicators	**Wrap up**	
		To get buy-in and potential volunteers for testing validity of to-be-developed indicators		
15:15-15:30	**Break**			
15:30-16:45	**Clinic I:** MEL capacity development for staff and partners	Share practical experiences on capacity development internally and with partners	**Inputs** (5 min each): PARTICIPANTS on creative approaches on how to enhance internal staff capacities as well as partner capacities on MEL **Working groups** on topics identified over lunch (30 min) **Very brief debrief in plenary**: 3 highlights (15 mins)	4 chairs at front PPT
16:45-17:00	Closure of workshop Day 1 Getting ready for Day 2	Make sure we have enough input to design the clinic on Day 2	**Re-confirm** people have provided their input for 2nd clinic (Day 2) (flip chart on wall) **Quick feedback on the day:** Handout cards, ask people to write 1–2 things they really liked about the day (on one side) and 1–2 things we should do differently on Day 2 (other side)	

Day 2 (2019)				
Time	Session	Objectives	Session Flow	Materials
08:30-09:00	Breakfast			
09:00-10:30	Communicating impacts	Discuss experiences from several organizations on how they communicate impacts effectively	Ask people to sit at a different table than yesterday. **Warm-up** (15 mins): Ask people to get creative: draw on flip chart or use pipe cleaners and playdoh to graphically represent "impacts" or "communicating impacts" or anything else related that comes to mind. At tables. Walk around the room to admire "art work" (5–7 mins) **Inputs from participants** (30 mins / 7 minutes each): • What are the data collection needs to back up your impact story? • What are capacities needed to capture impact stories effectively? • What are practical tools and approaches that have worked well to capture and disseminate impact stories? • How can learning from failures be communicated constructively, not just success stories? • How to communicate important issues and process steps that are not results or impacts? How to communicate lessons and learning? • How to balance 'contribution' versus 'attribution' in communicating impacts?	Pipe cleaners, playdoh 5 chairs at front PPT/handouts based on need

		Working groups facilitated by above participants (random distribution of people) (30 mins)	
		Debrief in plenary: 2–3 key highlights per group (15 min)	
10:30-10:45	**Break**		
10:45-12:30	Institutionalizing MEL: what's your strategy?	**Facilitated panel conversation** (5 min inputs each): PARTICIPANTS to answer key questions—	6 chairs at front
		• How to get MEL into projects and programs but also into strategic plans and broader strategies of organizations?	PPT/handouts based on need
		• What tools, processes and what type of data is most conducive to positively influence organizational cultures towards a culture of learning and M&E?	
		• What does it take to become a learning organization?	
		Working Groups organized by size of respective organizations (small up to 15 people, medium up to 50 people, large – more than 50 people) (30 min)	
		Debrief in plenary (30 min)	
12:30-13:30	**Lunch**		
13:30-15:15	**Clinic II:** Flexible!	**Energizer**! By participant (hopefully!)	Flexible: see how many groups we have; reconfirm on Day 1/end
		Co-created clinic: We'll have a list of topics by the end of Day 1. Possibilities: (a) People bring tricky MEL questions they are currently struggling with and get "live" advice from peers in small groups, (b) Sharing new tools/approaches etc., or (c) Something else exciting!	

Possible clinic topics:

- Tricky indicator or evaluation questions
- How to use data effectively to produce solid analysis

Possible topics for presenting specific tools:

- Contribution tracing to capture behavioral change
- ORGANIZATION'S data management system

15:15-15:30	Break		

15:30-17:00	**Next steps & closing**	**Next steps**	Flip-chart
		- Re-confirm commitments made to write blogs or other follow-up actions (immediate follow-up to workshop)	Paper
			Cards
		- Collect ideas from everyone on staying in touch after the workshop. How can participants maintain the connection in a way that works for them? What would be useful to in keeping the informal network alive (be realistic!)	Workshop evaluations/ survey
		- Personal commitments (not only looking at OSF)	
		Workshop surveys and evaluation	
		Close	