Review of Fingo's PMEL system 2021/22

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Disclaimer

The authors conducted the review and analysis presented in this report in close collaboration with the Fingo MEL team. The insights, findings and suggestions in the report are those of the authors, and do not necessarily reflect the views of Fingo. We would like to thank Outi Hannula and Senja Väätäinen-Chimpuku for their support throughout the review process. We would also like to thank the Fingo staff and all the respondents we met for making time to share their experiences and ideas with us.

Contents

Acronyms and abbreviations

M&E	Monitoring and Evaluation
MEL	Monitoring, Evaluation and Learning
MFA	Ministry of Foreign Affairs
NGO	Non-governmental Organisation
PDIA	Problem-Driven Iterative Adaptation
PMEL	Planning, Monitoring, Evaluation and Learning
ToC	Theory of Change

Executive summary

Fingo contracted Capability Oy to review the Planning, Monitoring, Evaluation and Learning (PMEL) systems in place to date. The review was conducted between November 2021 and March 2022 by Tiina Pasanen and Arnaldo Pellini. It is a time of change and consolidation for Fingo, and this review took place between the end of one programme and the beginning of a new one. We looked at the experiences and PMEL system to date and how they have evolved over the last few years. We were aware that our analysis, findings and suggestions would be discussed, considered and adapted to a new strategic plan, and to some extent, a different Fingo.

The specific objectives and purpose of the review as stated in the terms of reference were: 1) assess the current PMEL systems and their support and cohesion with the Fingo strategy (2021-2024), and Fingo's new programme and systemic theory of change (ToC) for 2022-2025; and 2) co-develop suggestions for adopting innovative tools and processes that can support the PMEL system to better focus on outcomes, while supporting Fingo staff to contribute to it, and draw valuable evidence and learnings that can help inform strategic programming decisions.

In agreement with Fingo's monitoring, evaluation, and learning (MEL) team, the review prioritises the characteristics of the MEL system, with only some elements of Fingo's strategic planning (P) processes being explored. The analytical framework we used is structured into three interlinked areas of enquiry:

- **Strategy and direction**, which refers to the ToC that Fingo developed.
- **MEL processes and system**, which refers to the management processes and procedures that Fingo has in place to monitor, document, learn and evaluate the activities and outputs produced, and the contribution to the intended outcomes and changes spelled out in the ToC.
- **MEL outputs and evidence use**, which refers to tangible products from the MEL work and the use of the analysis, insights, knowledge and learning from the MEL system and work.

The main findings are summarised below along each of the four areas of enquiry:

Strategy and direction: the ToC included in the 2022-2025 programme document provides an excellent visual illustration of the complex systems in which Fingo operates and the interconnectedness of the problems Fingo tries to influence. However, it is unclear to some of the respondents how the ToC was developed and its link with the programme of work implemented by Fingo. There is a gap between what the ToC describes and the work of Fingo's staff.

MEL processes and system: the MEL system – and the guidance to it – comes across as fragmented to the Fingo staff. While most Fingo staff appreciated elements of MEL processes, for some respondents, due to the type of work they are involved with, this is still too frequent. The sense of fragmentation in the MEL system is compounded by the fact that there is no dedicated full-time MEL team. There is also a gap or separation between the (new) programme results framework and Fingo's MEL plan, which contributes to the sense of fragmentation mentioned above, as well as a sense of excessive reporting for an organisation the size of Fingo. A recurrent comment about the current monitoring and data collection was on reporting activities and outputs, and less on documenting signs of change or contributions to outcomes. Overall, the staff is keen to further develop and contribute to monitoring data and analysis, as well as insights from learning and reflections.

MEL outputs and evidence use: the (P)MEL system produces a clear set of outputs every year. There are several instances where the monitoring data and analysis are quickly used to inform decisions about tweaking, adapting, and improving the implementation of specific activities (e.g., training events and the Maailma Kylässä and Mahdollisuuksien Tori festivals). Regarding data collected through bi-monthly reporting, there are mixed opinions about the extent to which this evidence informs the Senior Management Team's strategic decisions at the organisational level. The feedback is more unanimous about the contribution of the analysis from bi-monthly reports to other reporting and reflection processes, namely six-monthly sparring sessions and writing up the annual report.

There are two elements of complexity that characterise some of the challenges of Fingo's (P)MEL system. The first is that Fingo's portfolio work covers simultaneously established areas of work (e.g., capacity development), as well as highly uncertain and difficult-to-measure areas (e.g., policy influencing). The second is the ongoing merger between KEPA and Kehys, which established Fingo in 2018; this is still a work in progress.

The report describes in some detail suggestions we think could help Fingo strengthen the MEL processes and system, and links with planning and decision-making processes. Below we provide a high-level description of the main suggestions. Before doing so, we want to acknowledge that these suggestions draw and build on the several strengths that the MEL system has and the ongoing effort by the Fingo staff and the MEL team, in particular, to continuously review and improve the MEL tool and processes.

The high-level suggestions we have are:

- Strengthen the focus and joint ownership of the ToC by, for example, setting up an internal working group to design a programme ToC.
- Address the fragmentation of the MEL guidance as seen by the Fingo staff by producing and sharing a process diagram or flow chart that visualises the MEL processes; a MEL handbook/guidance document that organises in one place the existing MEL guidance documents.

- Streamline existing monitoring tools and processes by, as a first step, engaging with Fingo’s units to critically assess whether the bi-monthly activity reporting process is fit-for-purpose for their specific type of work and discuss ways to adapt the rhythm of the data collection between units.
- Consolidate the monitoring and documentation of the contribution to intermediate and longer-term outcomes by discussing internally whether to adopt Outcome Harvesting as the method for doing so.
- Increase and strengthen opportunities and spaces for cross-units learning and reflection to support emergent learning and intentional learning by the staff. This can be done by testing collective and cross-units portfolio sensemaking workshops and by investing in time-bound learning activities targeted at answering specific research questions.

1. Introduction

Fingo contracted Capability Oy to review PMEL systems in place to date. This report contains the findings from the data collection undertaken for the review, and conclusions and recommendations. We hope to provide ideas and suggestions that the Fingo staff can take, use and adapt to the PMEL system of the new four-year programme, which started in January 2022.

The review was conducted between November 2021 and March 2022 by Tiina Pasanen and Arnaldo Pellini. An additional activity to provide the Fingo staff with hands-on experience of a possible structured cross-units reflection process, portfolio sensemaking, is planned for writing in June 2022.

The primary audience for this report is the Fingo staff, particularly the Senior Management Team, the Board, the heads of units, and the MEL team. A key audience is also the relevant unit at the Ministry of Foreign Affairs (MFA) following the work of Fingo.

In terms of format, the report adopts the recommendations by the Canadian Health Services Research Foundation, which suggest a consistent structure for final reports of any kind (see Better Evaluation). Therefore, we have included one page outlining the main messages from the review, a one-page executive summary, and ca. 25 pages to present the main findings and recommendations, using clear language and avoiding jargon and technical terminology.

The main body of the report is structured as follows: introduction and background to the PMEL system review (Sections 1 and 2), the methods employed for the study (Section 3), the findings of the review (Section 4), conclusions and programming suggestions (Section 5).

2. Background of the review

The background and context of this review is the evolving process of change in Fingo. As an organisation, Fingo is relatively new in the developing civil society organisation landscape in Finland. It was established in 2018 by merging the Finnish NGO platform, Kepa, and the Finnish NGO Platform to the European Union, Kehys.

The four-year strategy launched at the merger "was formulated in 2018 to support and steer Fingo [...] the Strategy underlined the key role of Member Organisations in Fingo, but its direction-setting aspects were less pronounced" (Fingo Strategy 2021–2024, p.2). As a result, Fingo launched a new four-year strategy in 2021 to strengthen the umbrella role of Fingo and to "clarify Fingo's *raison d'être*, as well as our mission and vision, and provide a focus for the priorities of our activities" (ibid.).

We are writing this aware that all this is very familiar to the audience of this report. But, at the same time, this transition between the two strategic plans provides a critical backdrop to the timing of the review and contextualising our analysis and suggestions.

It is a time of change and consolidation for Fingo, and this review took place between the end of one programme and the start of the new one. We looked at the experiences and PMEL system to date and how they have evolved over the last few years. At the same time, we were aware that our analysis, findings, and suggestions would be discussed, considered, and adapted to a new strategic plan, and to some extent, a different Fingo.

In doing so, we recognised the heterogeneous nature of Fingo's work as a service and umbrella organisation.

The new strategy document mentions four interlinked areas of work (Fingo Strategy 2021-2024, p.3):

- Bringing together our member organisations and creating opportunities for cooperation with various actors.
- Strengthening member organisations' capacities to operate in a changing world.
- Advocating to reduce inequalities and promote human rights.
- Communicating about global development issues and the work of development civil society organisations.

The heterogeneity of Fingo's portfolio of work is also reflected in the different degrees of uncertainty of the contribution to change in the four areas mentioned above. Borrowing from

Michael Quinn Patton (2011),[1] we see some of Fingo's work as *complicated*, involving high levels of expertise and a relatively low level of uncertainty due to the experience that Fingo has developed over time (e.g., the Maailma Kylässä). Other areas of Fingo's work are *complex and address* so-called *wicked-hard* and *politically contested problems* (see Andrews et al., 2012, 2015, 2017).[2] Prescriptive protocols and blueprints do not work with these problems. Expertise helps, but it needs to be balanced with responsiveness and the capability to adapt and change plans and activities; as outcomes remain uncertain over time, the work involves trial and error (e.g. influencing Finnish Government international cooperation policies).

To measure and document Fingo's contribution to change with this heterogeneity is challenging due to the different degrees of uncertainty and complexity of Fingo's work and the fact that tools that are typically used in international development, such as results-based management, struggle with uncertainty and with adaptive/experimental approaches to change.

The international adaptive development debate addresses these challenges and has highlighted some of the implications for MEL systems. For example, David Booth (2016)[3] has noted that MEL systems that support adaptive initiatives need to try to strike a balance between generating M&E data and analysis that satisfies funder accountability requirements and provides acceptable evidence that a programme or strategy is on track, and at the same time, generating and rewarding the kinds of learning that are important for informing strategic decisions necessary to adapt and evolve when addressing complex challenges.

This means that M&E systems must include and link to L (Learning) investments to form a cohesive MEL system for an organisation or development initiatives. These MEL systems involve iteration and adaptation. They evolve to become hybrid systems that collect data and facilitate the emergence of insights and learning for decision making. There are no blueprints for this, but there are principles we can draw from and build upon, as we intend to do with this review.

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[1] Quinn Patton, M. (2011). *Developmental Evaluation. Applying complexity concepts to enhance innovation and use*, New York: Gulford Press.

[2] See: Andrews, M., Pritchett, L., Woolcock, M. (2012). Escaping capability traps through problem-driven iterative adaptation (PDIA) (Working Paper 299). Washington, DC: Center for Global Development.

Andrews, M., Pritchett, L., & Woolcock, M. (2015). Building capability by delivering results: Putting problem-driven iterative adaptation (PDIA) principles into practice. In A. Whaites, E. Gonzales, S. Fyson, & G. Teskey (Eds.), *A governance practitioner's notebook: Alternative ideas and approaches* (pp. 123–133). Paris: OECD-DAC Network on Governance.

Andrews, M., Pritchett, L., & Woolcock, M. (2017). *Building state capability*. Oxford: Oxford University Press.

[3] Booth, D. (2016). Incubating policy for economic transformation: lessons from Nepal. London: Overseas Development Institute.

2.1 Objectives and scope of the review

The review aims to provide a reasoned view of Fingo’s PMEL system. Therefore, the study intends to offer suggestions to support decisions about the evolution of Fingo’s PMEL systems as part of the new Strategic Plan 2021-2024.

The specific objectives and purpose of the review, as stated in the terms of reference, are:

- Assess the current PMEL systems and their support and cohesion with the Fingo Strategy (2021-2024) and Fingo’s new programme and systemic ToC for 2022-2025.

- Co-develop suggestions for adopting innovative tools and processes that can support the PMEL system to better focus on outcomes, and support Fingo staff to contribute to it and draw valuable evidence and learnings that can help inform strategic programming decisions.

2.2 Analytical framework and methodology

The analytical framework we used for the review adopted and adapted some of the elements of the monitoring and evaluation framework developed by Tiina Pasanen and Louise Shaxson (2016).[4] The framework benefits programmes and initiatives that inform and influence debates, attitudes, perceptions, and policies.

In the inception report of the review, we suggested structuring the review of Fingo’s PMEL system into four areas of enquiry, with each area of exploration having a specific set of analytical questions.

Strategy and direction refer to the ToC that Fingo developed and used to describe its strategic approach and influence to change through its portfolio of work in the new Programme 2022-2025. The review questions are:

- Is the programme ToC clear and sufficiently comprehensive?
- How does the Fingo staff interact with it, and how does it inform the design and implementation of activities, monitoring, and reporting?

PMEL processes and systems refer to the management processes and procedures that Fingo has in place to monitor, document, learn and evaluate activities and outputs produced, and the contribution to the intended outcomes and changes spelled out in the ToC. The review questions are:

4 Pasanen and Shaxson 2016.

- To what extent are the MEL management systems and processes fit for purpose in terms of accountability reporting and in supporting the adaptive and learning-driven implementation of the Fingo strategy and plans?
- What is the experience of the Fingo staff with the PMEL systems in the recent past (e.g., 2018-2021)?
- What MEL processes and tools have been used to collect data on activities, outputs, and outcomes?
- What PMEL processes seem to work well and why? Which ones are not working well and why?
- What are the funder requirements from the PMEL system, and does the system in place meet those requirements?

PMEL outputs refer to the tangible products from the PMEL work. The review questions are:

- What are the main outputs from the PMEL system (especially the MEL system)?
- How do these outputs respond to the funder's needs, Fingo, and if applicable, Fingo members?
- Are there (knowledge/evidence) gaps that the current outputs do not fill?

PMEL evidence use refers to the use of analysis, insights, knowledge and learning from the PMEL system. The review questions are:

- How have PMEL data/analysis been used for decision-making so far/in the recent past? What was helpful or less useful for Fingo and MFA?
- What PMEL data/analysis has been difficult to bring and make available to decision-making processes?
- What type of data and evidence, which is not being generated through the PMEL system, would be helpful for Fingo to assess progress towards strategic goals and inform strategic decisions about its portfolio of work?
- Where and can the PMEL system and processes be improved?

2.3 Limitations of the review

As with any review, we had to set some boundaries for our work, due to the usual time limitations to review programme documentation, conduct interviews, analyse them, and work on this report.

Through the semi-structured interviews, we acquired a sense of Fingo's ongoing organisational change process, however the analysis of the change process in Fingo was outside our scope of work. The Planning (P) and MEL processes and system are interlinked, but we agreed with Fingo's MEL team that the review would prioritise the analysis of the MEL part of the PMEL system. During the data collection we gathered opinions and feedback about elements of the planning process, and we mention some of this in the next section, even though we refer to the MEL system rather than the PMEL system.

Similarly, while we familiarised ourselves with the central area of work of Fingo, we did not explore in depth each activity area of Fingo. In addition, we interviewed several respondents, but not all possible respondents are linked and contribute to Fingo’s PMEL system through their work. Finally, we hope that our findings and suggestions can help inform some of Fingo’s decisions for the new strategy.

3. Review activities

The review was conducted by Arnaldo Pellini and Tiina Pasanen (see a brief profile describing their respective professional experience and background, and the specific role in the review in Annex 1).

The review activities were organised in three stages between November 2021 and March 2022, briefly described below.

Stage 1 - Project set-up and inception (November 2021) involved reviewing and co-designing the review framework and approach. It also helped set up the rhythm of the communication and check-ins with the Fingo staff to update them about the progress of the work.

Stage 2 - Data collection (November 2021-February 2022) involved a review of the programme and monitoring documentation in Finnish and English (see Annex 3 for a list of the documents we reviewed). This phase also involved semi-structured interviews with key informants. We conducted 20 interviews: 15 with Fingo staff and five with external stakeholders.

Stage 3 - Final reporting (March 2022) involved drafting the review report with our interpretation of the evidence we collected and our suggestions to the Fingo staff. This stage involved discussions and inputs from the Fingo staff for the final report.

The review plan developed during the inception stage included a fourth stage, a Portfolio Sensemaking workshop involving 12 to 14 Fingo staff members, or a mix of Fingo staff members and MFA counterparts. The plan was to hold the workshop in mid-February 2022, for the Fingo staff to experience and test a way to facilitate and structure a team and programme reflection and generate insights that could help inform Fingo's strategic choices and decisions around the coherence of its portfolio of work. We are applying the portfolio sensemaking workshop in another context and to structure the learning of the MEL system. The workshop, which is meant to be facilitated by the Chôra Foundation as a partner in this review, was postponed to June 2022 due to the timing of the transition of Fingo to the new programme and structure, as of April 2022.

Throughout the review process, we applied a set of principles on how the review team intended to carry out the assignment, and which touched upon communication, confidentiality, and data sharing, etc.

4. Review findings

In this section we present the findings from the analysis of the data collected through the review of programme and monitoring documents and semi-structured interviews. The results are shown in three areas and follow the analytical framework we developed for the study.

4.1 Strategy and direction

The findings in this section refer mainly to the programme ToC that Fingo developed and used to describe its strategic approach to, and influence over, change through its portfolio of work in the new Programme 2022-2025. We focused on the programme ToC for our review as it is the current and latest version describing and framing the change objectives of Fingo for the next four years.

In the words of Patricia Rogers (2014), a ToC “explains how activities are understood to produce a series of results that contribute to achieving the final intended impacts. It can be developed for any level of intervention – an event, a project, a programme, a policy, a strategy or an organisation” (p.1). [5]

We include this ToC definition for a couple of reasons. The first is to make our point of view explicit, that a ToC is a crucial tool to describe the direction of travel and the changes at different levels that an organisation such as Fingo wants to contribute to.[6] Moreover, a good ToC “provides the ‘backbone’ of your intervention and monitoring and evaluation structure” (Pasanen and Shaxson, 2016).[7] A good ToC allows you to set indicators, and make explicit and visible the different pathways the change process can take. A programme team owns a ToCs when they are able to point to the parts of the ToC they try to contribute to through their work and efforts.

5 Rogers, P. (2014). Theory of Change, Methodological Briefs: Impact Evaluation 2, UNICEF Office of Research, Florence.

6 There is a whole discussion that could be started here as to whether a ToC is actually the right wording for this tool. For us, a ToC is more like a hypothesis of change or changes that a programme and an organisation try to contribute to and influence through the implementation of activities. This is, however, a discussion for another moment or another paper.

7 Pasanen and Shaxson, 2016. *How to design a monitoring and evaluation framework for a policy research project*. Methods Lab Publication. Overseas Development Institute, London.

4.1.1 Overall, the feedback we received is that the ToC included in the 2022-2025 programme document provides a good visual illustration of the complex systems in which Fingo operates and the interconnectedness of the problems Fingo tries to influence

The respondents acknowledged that several of the issues they try to address through their work in Fingo are part of the messy and complex reality of influencing and changing policy and public perception of international development in Finland. They recognise that there are no ready-made answers to some of these challenges and that change does not emerge in a linear way. Everything is interconnected, and everything affects everything. The system language and system thinking principles included in the ToC and the new programme resonate with the staff, even though they remain somewhat abstract concepts for some.

4.1.2 It is not clear to everyone how the ToC was developed

The respondents are split 50-50 between those who are not clear about how the ToC was developed and about who led the design process for it, and those who mentioned that they were aware of the ToC process and felt it was not created in a collaborative way. The implication is that not all staff members have a sense of 'ownership' of the ToC and refer to it in their work.

4.1.3 Staff members struggle to see how, in its current form, the ToC can help structure discussions and reflection about Fingo's progress and contribution to change

A few respondents mentioned that the current ToC may be too high-level for what would be needed to inform choices about plans and activities and reflect on implementation. Moreover, some respondents mentioned that the ToC in its current format and visualisation does not help the reader see specific areas of change Fingo wants to focus on. To some respondents, Fingo is aiming at too many changes under the three primary outcomes, and they wonder whether Fingo is spreading itself too thinly across too many areas of work for the resources it has.

The ToC visualises the complexity of the systems Fingo tries to influence. In this respect, we see it more as a system map – a map of the interlinked challenges/changes that Fingo tries to address and influence. As noted by the MEL team, during the design stage of the 2022-2025 programme during the spring of 2021, the plan was to develop specific ToCs under the main ToC for each outcome area (i.e., nested ToCs), but this did not take place due to time constraints and other tasks being prioritised at that time.

ToCs come in different forms and with various purposes, but they are different to systems maps. In its current state, we feel the ToC is more of a system map and less of a description of some of the pathways to change and assumptions that Fingo has decided to pursue, and what (and how) Fingo aims to influence within the system.

We believe a system map can be a helpful input to the design of a programme ToC. It would provide an image, a visualisation, which would help the Fingo staff make choices about the leverage points and changes that Fingo has the potential to influence, with its limited resources and time available. The system map could also be a tool to help monitor the changes in the context and systems in which Fingo operates, and help inform decisions about what to pursue, what to expand, and perhaps what to stop. In our opinion, it should complement a ToC that, according to Rogers (2014), “explains how activities are understood to produce a series of results that contribute to achieving the final intended impacts”. We believe the current ToC struggles to do that.

4.1.4 The relationship between Fingo’s strategy (i.e. ToC) and Fingo’s programme of work comes across as unclear

The review of Fingo’s areas of work or the processes adopted to structure its portfolio of work is outside the scope of this review. We, therefore, do not comment on that. However, an insight that emerged from the semi-structured interviews is that several respondents perceive a sort of ‘misalignment’ between the current strategy and the activities implemented through the programme. For example, key priority areas in the strategy, such as the sustainable economy and climate justice, do not have the same degree of prioritisation in the programme portfolio. In other words, they do not seem to be a priority activity area. Some felt that the programme had almost ‘replaced’ the strategy as a critical steering document instead of drawing from the strategy and translating it into concrete work areas and initiatives.

An unresolved point in the internal discussion in Fingo is whether Fingo as an organisation needs a strategy with operational objectives or should rely mainly on four- to five-year programmes to manage its portfolio of work. Some of the respondents mentioned that the programme funded by the MFA was the main area of work for Fingo, and its goals, outcomes and outputs should be sufficient to guide and describe Fingo’s work. On the other hand, some think a strategy is needed and can help guide the programme funded by the Finnish MFA and other smaller-scale projects.

In our opinion, typically, the development of a ToC (and other similar ‘visioning’ exercises) can help put into words and visuals the strategic choices that an organisation such as Fingo has made in terms of the changes it wants to contribute to through its portfolio of work (i.e., projects and activities). Different funders and programmes allow Fingo to implement its strategy and test its hypothesis of change. For example, the programme funded through the

Finnish MFA is likely to be the main programme implemented by Fingo, but it may not cover the whole strategy of Fingo.

4.2 MEL system and processes

The findings in this section refer to the management processes and systems that Fingo has in place to monitor, document, learn and evaluate the activities and outputs produced, as well as the contribution to the intended changes spelt out in the ToC.

4.2.1 There is a sense that the MEL system is fragmented

While most Fingo staff appreciated elements of the MEL process, several mentioned its ‘fragmented’ nature and the challenge in getting an overall or comprehensive view of how things are linked. For example, data are recorded in several places, and for some, it is not always clear where and when. Some also feel that while the recent changes may be relevant, the rationale for changes is not always clearly explained. Finally, some people mentioned (and we could not find one in the documentation we reviewed) that this sense of ‘fragmentation’ is supported by the lack of a MEL document/handbook with text and flowcharts describing the MEL tools and processes, and how they link together.

The fragmentation of PMEL is likely, and at least partly, explained by the nature of Fingo’s work. This review did not focus on how Fingo’s work is organised. Still, during the interviews, it became increasingly clear that Fingo (as an umbrella organisation) is trying to fulfil many different tasks, roles, needs and expectations. External interviewees also shared this notion. Fingo and its staff are doing a lot: providing services for members, bringing coordination and cohesion to the NGO field, influencing policymakers, improving their internal work, etc. For example, the advocacy unit has seven specialists working on different priority areas. Each has responsibilities to influence decision-makers, support members’ work in the area, and support Fingo’s internal work.

We think that one reason for Fingo’s (P)MEL coming across as fragmented is that Fingo’s work is, if not fragmented, then at least very multi-dimensional. Given that the staff tends to have a range of responsibilities and tasks, it is no wonder that bi-monthly reporting can take a reasonable amount of time.

4.2.2 Recent MEL process changes are seen as positive steps in the right direction of streamlining and simplifying the MEL system

Several respondents mentioned that during 2021 there were several changes and tweaks in the MEL processes that were considered positive and vital improvements.

For example, the move from monthly activity reporting to reporting on activities every second month helped reduce some of the time that the units had to allocate to reporting. The respondents mentioned as particularly positive the launch of six-monthly ‘sparring’ sessions. These provide a ‘fresh pair of eyes’ on the work of a unit, which has helped to highlight new insights about what works and what does not. In a few cases, it has made the staff realise that the some of the data reported for the activity reporting did not provide valid points about progress towards outcomes and changes they wanted to see and influence. However, some respondents mentioned that the reflective questions developed by the MEL team to report on any learning and outcome level changes were helpful.

4.2.3 The MEL reporting rhythm is perceived by some as still too frequent and primarily focused on activity and output reporting, which leads to a duplication of reporting work

While the units have welcomed the move from monthly to bi-monthly reporting, it is still too frequent for some respondents. This varies across units, depending on the type of work they engage with. For example, the policy influencing work may not provide enough new data every two months (especially at the outcome level). On the other hand, the work leading up to the annual Maailma Kylässä festival is relatively standard. It involves fundraising and sponsorship agreements that are repeated every year. Therefore, the reporting could be less frequent and culminate in the annual festival report, which includes all the data and information collected before, at, and after the event.

Some respondents mentioned that the staff and units collect and discuss (monitoring) data during their (e.g.) weekly unit meetings. They use them to make decisions about specific activities and tasks. They then have to input these data and information (plus others) in the bi-monthly forms after decisions have already been made or actions taken. For some respondents, this involves duplication of work and is prone to input errors.

We were told that the bi-monthly reports were purposely on activities and outputs. The intent is to give the Senior Management Team a sufficiently detailed aggregate overview of the progress of the planned activities across the organisation. This helps the Senior Management Team decide, for example, how to resolve bottlenecks, how to streamline processes, and whether to adapt and change some of the planned activities. However, the responses we received from our interviews show that some of the staff are unclear about this emphasis on activities and outputs and wonder why there is not more focus on documenting and recording signs of change and contributions to outcome-level results.

4.2.4 Staff would welcome greater focus on reporting on outcome level changes and results

A consistent theme emerging from the conversations with respondents (both internal and external to Fingo) was the need to strengthen the attention and focus of Fingo's MEL work towards outcomes (i.e. the changes Fingo's work contributes to) and, at the same time, reduce the strong emphasis and investment of time and resources in reporting on activities and outputs (i.e. what Fingo does).

In our experience, when staff have limited time to input to the MEL requests and data collection, the focus falls on activities and outputs (i.e., what we do and what we produce) with limited attention and time for reporting on outcomes.

4.2.5 Some units have developed ad hoc processes for recording and using monitoring data

There is split opinion among respondents about the CRM Dynamic system. Some find it useful, while some struggled to familiarise themselves with it and do not use it. Others avoid it altogether. This resulted in units or individuals developing dedicated and ad hoc spreadsheets used to store information and data. The advantage of Dynamic is that by uploading data in it, it populates a database that cannot be accidentally edited or deleted. Having said this, some find that it is not user-friendly and resort to other solutions.

4.2.6 There is a separation between the new programme results framework and the overarching MEL plan of Fingo, which contributes to an excessive amount of reporting for an organisation of the size of Fingo

This is the review area where we struggled the most to gain clarity. It took us some time, but we concluded that Fingo has developed a results framework for the current programme, which is seen as a separate data collection and results-in-monitoring tool from 'standard' monitoring and data collection, to which the staff (for example) contributes bi-monthly. The version of the bi-monthly report used in 2021 was categorised by impact and outcome areas found in the old programme, and it contained some 70 goals for the year (with associated half-year goals for the second half of the year). The new version for 2022 and onwards that was used in March 2022 for the first time seems to have a similar number of annual goals. However, it is slightly more challenging to count the exact number, given there are typically several goals listed in one column. The yearly goals in the bi-monthly reports are formulated mainly in a manner of 'things that will be done during the year / by the end of the year'. Thus, what is reported are mainly outputs and activities, as discussed in the points above.

We understand that the programme results framework is reported only once per year when the annual report is submitted to the funder and the Board. The bi-monthly reporting is set up not just for the yearly aggregate report. Still, there seems to be a long list of indicators for which monitoring data are collected. We are not sure of the extent to which they were, and will be in future, informing the annual results reporting or management decision at the organisation or unit level. Table 1 illustrates the number of indicators and reporting requirements we understand.

Table 1 - Existing data collection/reporting tools

Reporting tool	Focus	Short description of the content
H1 goals and bi-monthly report (used in 2021)	Activity and output level reporting (some uptake too)	Excel includes approx. 70 annual goals and 70 six-monthly goals (different levels, often formulated in a comprehensive manner); they focus mainly on activities (what was done) and outputs (what was produced), but uptake (downloads etc.) are also included. A mix of qualitative and quantitative information.
Six-monthly sparring sessions	Reflection of the progress towards annual and six-monthly goals	More review than reporting, uses bi-monthly reports to reflect progress and process, bringing a 'critical friend' outside the unit to support. It records critical reflections in the same tab as the units' bi-monthly reflections.
Results Framework for the Programme 2022-2025	Output and outcome level indicators	28 outcome and output indicators with baselines and targets, recorded in 'Dynamics' internal database and annually reported to the MFA.
Results Framework for the Strategy 2021-2024	Output and outcome level indicators	15 indicators under four strategic aims from reporting to the Fingo Board.

The new programme document mentions the results framework and the MEL plan as two separate items. We were informed that the MFA requested this. Strategy 2022-2025 has its own set of indicators, though fewer than the programme's results framework. We understood that following those indicators is not taking place. This may be partly because Programme

2022-2025 has become the main steering document for Fingo even though it was not its initial aim, as discussed in the previous section.

The MEL plan and results framework seem disconnected. In our experience, the results framework is one of the critical elements for an organisation or programme MEL system. The results framework informs what data need to be collected, at what level, for what indicators, and the rhythm of the monitoring work. An organisation or large programme usually has one results framework and, if needed or required by funders, dedicated and project-specific ones. We think that this split, and the multiple sets of indicators, targets and goals, result in an excessive amount of reporting for an organisation of the size of Fingo (see also 4.2.2).

Before closing this section, we want to highlight two interlinked points. The first is that there is a misalignment between the intent of the new programme (2022-2025) to adopt a more systematic and experimental/adaptive approach and the current number of indicators, annual (and bi-annual) targets, traffic light system, and results frameworks, etc., which follow a more traditional linear results-based logic of pre-set targets and goals. This is not to say that programmes or organisations that apply systemic thinking in their work should not have pre-set targets. It is about balancing plans and goals and having the flexibility to change those when needed based on the data, analysis, and insights on some key indicators and learning.

Second, some of the outcomes and goals in both the programme (results framework) and the Fingo bi-monthly report are articulated in a manner that makes it hard to understand what they are about or aiming for. For example, the outcome 'Finnish and EU policymakers have demonstrated their duty bearer role in key processes to support civil society to carry out its comprehensive role in promoting sustainable development' (Outcome 1 in the Results Framework for the Programme 2022-2025) is unclear and leaves questions for external readers, such as which processes, what is the change, etc.

4.2.7 The Fingo staff is reflective and learning-oriented

The Fingo staff comes across as being reflective and thoughtful. They are keen to further develop their work through monitoring data and analysis, as well as insights from learning and reflections. However, this is something that should not be taken for granted. An organisation such as Fingo, which is committed to adaptively managing its work (i.e. intentionally using evidence and learning to test different solutions and tweak programme implementation when needed), requires staff with particular attributes, mindsets and soft skills. Curiosity, critical thinking, communication and listening, understanding and interest in the political economy of the context, and being comfortable with uncertainty are all essential elements for adaptive programming, and differ from the business as usual of international development.[8]

8 See Wild and Ramalingam, 2018. Building a global learning alliance on adaptive management. ODI Discussioni Paper.

Several respondents mentioned how their engagement with the MEL systems and activities is a considerable part of their work. Examples are bi-monthly reporting, the sharing and learning in units, collecting data on activities or participants’ feedback, or contributing to annual reports and other reporting outputs. This engagement with the MEL systems means that all the respondents have some ideas about how the MEL system and the MEL processes (or part of the processes) could be tweaked and improved.

4.2.8 There are mixed opinions about what constitutes a learning event or space, and most of the staff would welcome more opportunities and areas for organisation-wide/cross-unit and structured learning spaces

Closely linked to a greater focus on outcomes and changes (or contributions to change) in context and systems is the request to provide more opportunities for learning and reflections facilitated through the MEL system. Learning and sharing are happening, but it is perceived in different ways by different respondents. Some people mentioned that learning (and sharing) spaces and moments occur within staff and units. There seem to be fewer opportunities for cross-unit/organisation-wide learning. We asked all our respondents to recall cross-unit learning events or moments. The answer was mixed. Some could not recall any cross-unit learning events (though most agreed that they could exist, but they just couldn't remember any at the time of the interview). Others mentioned a learning event usually taking place in February. Others in May-June linked it to the current process of developing the annual plan (i.e. toimintasuunnitelma), which involves cross-unit discussions, and saw it as a learning moment/process. This may be because the process of developing the toimintasuunnitelma has been split into two parts: a design discussion for planning in May-June and the write up after the summer break in August. A few felt that this process was very positive and something that could be built on.

The bottom line is that most of the respondents hope for more cross-unit learning sessions or events while recognising that everyone in the organisation has time pressures and was mindful that more learning might not be what everyone wants. This happened to be the case as a few interviewees felt that there were already enough, if not too many, discussions and reflections happening in the organisation and that they could use more structure and focus.

4.2.9 Resourcing of the MEL work

From the interviews we conducted we learned that there is no dedicated full-time MEL unit in Fingo.

A rule of thumb for a ‘typical’ programme is to allocate approximately 5%-10% of the budget MEL. This is expected to be higher for programmes or organisations using adaptive management (Pasanen 2018).[9] The relatively high share of the budget is justified by the fact that adaptive initiatives require investments in MEL systems (particularly the L) that generate evidence for accountability reporting and, importantly, iterate and inform strategic decisions about activities and the whole portfolio of work.

Fingo's MEL budget for monitoring, surveys and evaluation work is approximately 45,000 Euros/year. In terms of data management, the MEL work relies on existing systems software such as Teams, Office and the Dynamic, and does not add costs to the MEL budget. The estimates we received in terms of staff time for MEL is that, on average, staff members use 2.5% of the working hours for MEL; directors use 4.5%; the director of the Learning Unit uses 16.5%, and the MEL advisor 40%. There is no MEL unit in Fingo, and two colleagues constitute the core MEL team, although none of them is full-time on MEL.

The information we gathered did not allow at this point to assess whether the budget allocation of all MEL costs (including staff time) falls between 5%-10% of the programme budget.

4.3 MEL outputs and their use for reporting and decision making

The findings in this section refer to tangible products from the MEL work, such as documents, reports, analysis, etc. We include some outputs from the planning (P) process as well.

Fingo's planning and MEL systems produce the following outputs:

- Strategy and programme documents with their own results frameworks
- Annual plans organised with six-month targets
- Personal six-month plans for each staff member
- Bi-monthly reports from units
- Six-monthly reflection and action points based on the sparring sessions
- The annual report to MFA, which includes a synthesis of MEL data and analysis
- Externally commissioned evaluations
- Quarterly reports to the Board, which include a synthesis of MEL data and analysis (as of 2020)
- Annual report to the Board and the members' General Assembly

[9] Pasanen, T. (2018). Monitoring and evaluation: five reality checks for adaptive management, Blog, Overseas Development Institute. Available at: https://odi.org/en/insights/monitoring-and-evaluation-five-reality-checks-for-adaptive-management/

4.3.1 The evaluations commissioned by Fingo are seen as helpful and of good quality

Recent external evaluations focused on either specific programmes (such as the mid-term review of Fingo’s advocacy work in 2020 or the Power Bank Evaluation in 2021) and Fingo’s advocacy efforts. The staff sees these evaluations as good quality, with useful findings that either helped or could help them improve their work. There has been no organisation-wide evaluation of Fingo yet, given it has only operated for three years. However, it is promising that evaluations have focused on some aspects of Fingo’s work.

4.3.2 Staff believe monitoring reports focus primarily on activities and outputs

Linked to the process findings in Section 4.2, several respondents mentioned that monitoring data collection focused primarily on activities and outputs. This means that the monitoring data do not sufficiently highlight areas of change that could help inform some of the units’ decisions around strategy and actions. The focus of the monitoring data collection on activities and outputs means that the annual reporting to the MFA could provide more evidence about the contribution to high-level changes and outcomes than it does now.

4.3.3 There are several examples of monitoring data that are being collected, and the insights from evaluations feed into the design, planning and implementation

There are several instances where the collected evidence is used for tweaking, adapting, and improving the implementation. These instances include, for example, participants’ feedback on Fingo’s training events, the Maailma Kylässä festival and Mahdollisuuksien Tori events.

Recent evaluation findings and recommendations are other precise instances of the use and uptake of evidence produced through Fingo’s MEL work. Evaluation recommendations, management responses and how Fingo aims to develop its work based on them are included in the Programme 2022-2025. This, and the fact that several respondents found the evaluations useful for Fingo’s work, indicate that commissioned evaluations were well-targeted and ‘user-focused’.

4.3.4 Influence of bi-monthly reports on strategic decision-making is minimal

Most respondents thought that the data they provided to the bi-monthly reporting system was not used to inform the Senior Management Team’s strategic decisions at the organisational level. Some also mentioned that they were unclear about whether data and information reached the Senior Management Team. While there are mixed, and even contradictory, views to a large extent, the Senior Management Team agrees that this data is not used to inform decision-making or that its influence is minimal now.

While we agree that the Senior Management Team does not need to comb through all the data about the 70 goals, we were told that the Senior Management Team discusses and responds to the parts of the bi-monthly report that are highlighted in red and that require action (i.e., through the traffic light system). The decisions and actions are recorded in a memo of the management meetings. However, we feel this is limited and not very efficient, given the amount of data collected.

If this is added to the uncertainty expressed by some of the respondents about whether the Senior Management Team uses the bi-monthly reports, then there is a risk of creating a sense of frustration (or confusion) among staff about why the information is being collected in the first place. Thus, on top of improving the use of monitoring data for (strategic) decision-making, it is also important to improve the communication about their use and usefulness. Otherwise, there is the risk that MEL processes are seen as a one-direction system where staff provide data to management, but management does not report back how they use this.

4.3.5 Bi-monthly monitoring reports feed into other Fingo reports and, to some extent, to the learning efforts

Bi-monthly reports feed into, or at least influence, other reporting and reflection processes, namely six-monthly sparring sessions and writing up the annual report. For example, for some respondents, bi-monthly reports act as a helpful background 'database' to check whether and when things happened when drafting their parts for the annual report. Moreover, progress towards a unit's aims is discussed during the six-monthly reporting and 1:1 discussions with supervisors. It is worth mentioning that writing annual reports and action plans for the next year seems to happen within units, or people working on documents alone. As previously discussed, structured organisation-wide reflection and planning sessions are rare.

In the next section, we present a helpful suggestion to strengthen the elements of the MEL system that would work well and address some of its current weaknesses.

5. Conclusions and suggestions

In 1983, Dennis Rondinelli wrote in *Development Projects as Policy Experiments: An Adaptive Approach to Development* that because of the inevitable uncertainty that permeates development initiatives of any size, "all developmental activities are essentially experimental".[10]

We think that in the case of Fingo, the uncertainty (and complexity) that Rondinelli refers to broadly speaks to two main areas, both of which have important implications for Fingo's P and MEL system.

The first is Fingo's portfolio work, which simultaneously covers different fronts and work areas. Some of these may be quite established (e.g. capacity development and convening). Others are characterised by a high degree of uncertainty and are difficult to measure and document (e.g., policy influence or informing and influencing public opinion). Some respondents believe that some of the impact-level changes included in the Programme 2022-2025, as currently stated, may be out of reach, given Fingo's resources (e.g., Impact Statement Table 1 on page 6: *Civil society organisations in developing countries can implement their role in sustainable development*).[11]

The second area of uncertainty (and complexity) refers to the ongoing merger process between KEPA and Kehys, established Fingo in 2018. The merger is still a work in progress that will continue to evolve throughout the new programme implementation from January 2022. Mergers of established organisations bring together ways of working that have evolved over several years and which require time to take shape. Therefore, the merger is essentially an ongoing experiment that will evolve through adaptation, iterations, successes, and corrections to failures.

Fingo has excellent foundations to develop its MEL system further

The focus of this review was the MEL processes and systems established in Fingo. We touched on some elements of the planning (P) process but not in depth. Overall, although we identified some challenges in the current MEL systems, we also see that efforts to continuously reflect on and improve the systems and processes are underway.

10 Rondinelli, D. (1983). *Development Projects as Policy Experiments: An Adaptive Approach to Development*. New York, NY: Methuen.

11 A note on this point: the impact statement as it is currently stated described a contribution to the capability development of civil society organisations in the south, which may well be out of reach even as a contribution. At the same time, the Outcomes and Outputs statements describe support to Finnish civil society organisations and NGOs that then engage and collaborate with civil society organisations and NGOs in the south. We think that the issue here is consistency in language rather than an ambition by Fingo to directly develop the capabilities of NGOs in the south.

Fingo has all the features of a robust MEL system. A range of data is collected to gather evidence on several indicators. Units have well-established ways to reach out to partners and participants to gather feedback on events (e.g., Maailma Kylässä, training, workshops, etc.). These data are then analysed, documented, and fed quickly into the design of the next round of activities.

In our opinion, the staff in Fingo clearly understand the value and are committed to providing inputs to the MEL system to contribute to reporting to Fingo's primary funder, the MFA, as well as other funders. There are some opportunities for learning and reflection within units and staff that help inform decisions to quickly adapt activities and approaches in their work areas.

The development of the MEL system is an ongoing and iterative process

Getting MEL systems and processes 'right' is challenging and elusive. There is no endpoint to it, just iterative cycles of (co)design, testing, implementation, learning and redesign of parts of the system. This is challenging for any organisation and requires balancing between different expectations, different needs within the organisation, and resourcing (i.e., budget allocations and staff time). As an interactive process, it requires regular sense-checking and adaptation. It is also important to acknowledge that developing a system that addresses all the different expectations, needs and preferences within Fingo and its funder(s) is not realistic, and that Fingo's MEL system is likely to be a compromise between these different perspectives.

A set of structured suggestions

In the rest of this section, we present the suggestions we want to offer. Our approach in developing these suggestions has been to make the most of the several strengths that the MEL system has, address some of its weak spots, and streamline some of its processes.

We have decided to group the suggestions into what we think are action areas. There is no 1:1 relationship between findings and suggestions. This is because several findings cut across the areas of our analytical framework. We suggest six action areas:

- Strengthen the focus and joint ownership of the ToC
- Address the fragmentation of the MEL guidance to the Fingo staff
- Streamline the existing monitoring tools and processes
- Consolidate the monitoring and documentation of the contribution to intermediate and longer-term outcomes
- Keep the staff informed about the ways monitoring data, analysis and learning inform decision-making
- Increase and strengthen opportunities and spaces for cross-units learning and reflection.

Whenever possible, we have divided the suggestions in the action area into those that could be addressed relatively quickly during the new programme implementation (which we call *quick wins*) and those requiring discussions and co-design within Fingo that may need some time to be tested and implemented in steps (which we call *longer-term suggestions*).

Strengthen the focus and joint ownership of the ToC

The ToC included in the new programme documents for 2022-2025 is more of a system map. It helps visualise the complexity of the system that Fingo tries to influence, but it is less valuable in describing and visualising the concrete pathways and changes that Fingo has decided to pursue within the system.

The suggestions we have are for the longer term, as they involve some internal discussion and collaborative work in developing a clearer ToC:

- **Keep the system map and include it in Fingo's MEL toolkit.** The idea is to update the map (e.g.) once a year and discuss in a cross-units workshop or meetings how the system in which Fingo operates is evolving and changing. We also suggest testing ways to make the system map more accessible and reader-friendly by, for example, uploading it to an intranet page and thinking about ways to highlight specific parts or relationships and inform strategy discussions. This suggestion may involve the development of some internal capability to use Kumu in the MEL team.

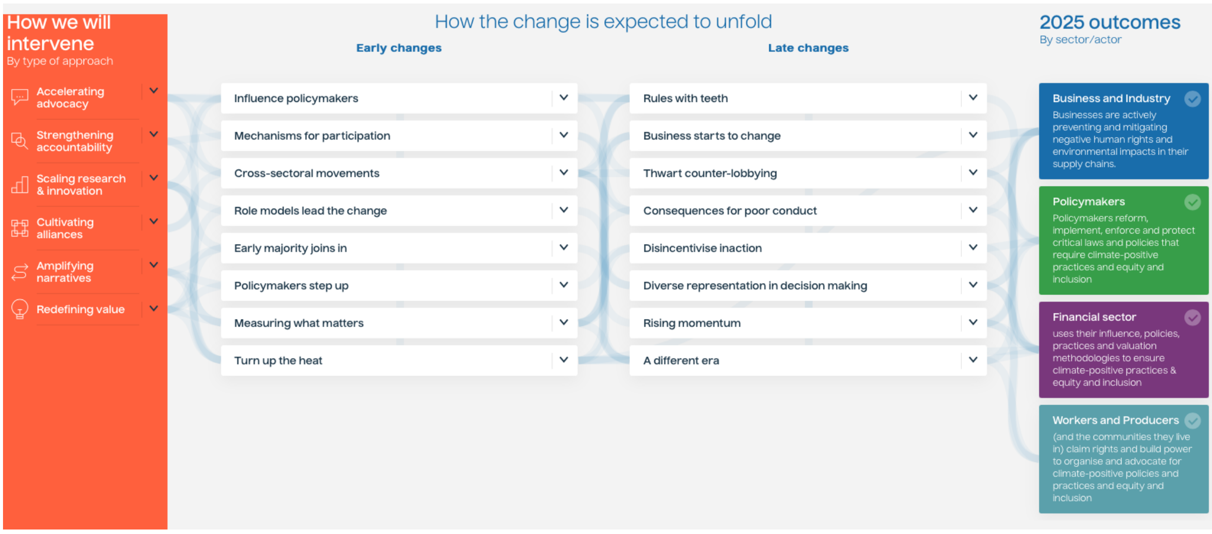
- **Set up an internal working group to design a programme ToC.** The work will draw from the system and context analysis, the key elements of the new programme and the design of a programme ToC describing the goal, intermediate and longer-term outcomes, main areas of work, or initiatives. The working group could discuss which, among the several challenges that the system map describes, are the ones that Fingo intends to address over the next few years. In doing so, the group could explore the value of participatory tools such as the Fishbone / Ishikawa diagram and the Triple-A analysis to assess the space of change described in Problem-Driven Iterative Adaptation (PDIA) (see Smaji et al. 2018; [12] see also an example of some of these tools in Annex 4).

  These discussions will help assess the change space that Fingo has around specific problems and challenges and some of the assumptions supporting or hindering the change efforts by Fingo. The discussions above will result in multiple pathways to change linked to the outcomes that the units identified.

12 Samji, S., Andrews, M., Pritchett, L. and Woolcock, M. (2018). PDIA toolkit. A DIY Approach to Solving Complex Problems. Boston MA: Centre for International Development at Harvard University. Available at: https://bsc.cid.harvard.edu/files/bsc/files/pdiatoolkit_ver_1_oct_2018.pdf

During the review process, we attended a webinar organised by Climate-KIC and SIDA on monitoring complex and adaptive initiatives, where we learned about an interesting way to design a ToC. The example that was shared is from the Laudes Foundation in the Netherlands.[13] The ToC designed by Laudes includes an interactive digital visualisation that allows the reader to highlight specific pathways of change. Laudes mentions on its website that "our interactive ToC illustrates how our interventions contribute to short- and long-term changes. It guides our actions, shapes our decisions on partnerships, informs how we monitor and evaluate existing relationships, and provides a framework for impact assessment".

The ToC can be studied here:[14]



Starting from the left, the ToC includes the six main approaches that the foundation supports. The central part of the ToC includes a description of how changes are expected to unfold in the short and longer term. Each change has a short title and a drop-down box with a brief descriptive paragraph. The example from Laudes Foundation does not include text about assumptions, but they can be built in with some additional design work.

The ToC ends with a column (on the right-hand side) that describes the four outcome areas by the end of the current programme 2025. These are described as behaviour changes. The Laudes team monitors and learns about the changes in the ToC with the help of bot quantitative monitoring data, and with rubrics to assess the extent to which change is emerging or not.

We suggest that the MEL team at Fingo approach the MEL team at Laudes to learn more about the development, design, and use of their ToC, and then discuss internally what elements of the Laudes ToC could be adapted and tested.

13 See https://www.laudesfoundation.org

14 See https://toc.laudesfoundation.org

Address the fragmentation of the MEL guidance as seen by the Fingo staff

To address the fragmentation in the MEL guidance and to improve the understanding of the Fingo staff of the key elements and processes of the MEL system, we propose a few interlinked actions.

Quick wins:

- **Design a process diagram or a flow chart** to visualise the MEL processes, their links, and how the different data sources feed into other decision-making processes at different levels of the organisation. If easier, include links to a description of the Planning processes (P) with the MEL processes.

- **Design a MEL handbook/guidance document** that: 1) complements the diagram or flow chart mentioned above; 2) organises in one place the existing MEL guidance documents; 3) describes the MEL team roles; and 4) describes the MEL team main activities and yearly deliverables. It should be easily accessible and updated regularly and could be stored on an intranet site like Google Drive, or a dedicated section of MS Teams.

- **Conduct a light-touch assessment of the financial resources** that go into MEL work (including staff time by the MEL team and an estimate of the staff) and calculate the percentage of MEL work against the programme budget. We think that the resourcing should be between 4% and 5% of the programme budget.

Longer-term suggestion:

- **Design a process whereby changes to the MEL processes and tools involve discussions and co-design with the staff and unit representatives.** This will contribute to strengthening the ownership of the MEL system across the organisation. Not everyone will attend these types of meetings but given the part that MEL plays in everyone's work, a portion of the staff will appreciate it. This is also a way to identify and support staff who are keen to learn more about MEL.

Streamline the existing monitoring tools and processes

One of the reasons for the fragmentation in Fingo's MEL system is the multi-dimensional nature of Fingo's work. Fingo has several objectives and responsibilities, and it needs to consider a range of needs and interests of member organisations and policy actors. The suggestion we present below aims to contribute to the internal coherence by streamlining some of the monitoring tools and processes.

The current bi-monthly data collection and reporting is a positive step forward from monthly reporting, but it seems to be still too frequent for some units. Moreover, some of the data points that units must report against are unclear. For example, many of the annual goals are broad. As a result, the reporting mixes levels, and types of results and emphasises activities and outputs that have been produced. Notably, the evidence we have collected points to the fact that the extent to which the Senior Management Team uses the analysis of the data to inform strategic and operational decisions is unclear.

The suggestions below are presented as interlinked steps, starting with what could be done first. Most of these suggestions are relatively quick fixes, though some of them may need more time to be properly discussed and agreed upon with units:

- As a first step, **engage with /units to critically assess whether the bi-monthly activity reporting process is fit-for-purpose for their specific work.** This assessment can be helped by questions such as: Who is the reporting for? Who needs and uses the data? What decisions benefit from the analysis of the data?

- **Consider allowing flexibility in the MEL of data collection to sit with the specific work of a unit and staff.** For example, this could be six-monthly for the unit working on the Maailma Kylässä and quarterly for the units working on capacity development with member organisations. As a general rule, we see that quarterly data collection is likely enough.

- If the bi-monthly reporting is maintained, consider whether **unit managers could have some dedicated time to pull together and interpret data and information to inform decisions about changing and adapting activities, processes, and approaches**. For example, managers can make sense of the various data reported in their areas of responsibility and report to the Senior Management Team (and the Board) key things that data is telling them.

- **Consider removing six-monthly targets from the bi-monthly reporting system.** Six-monthly targets for the type of long-term capacity-building and influencing work that Fingo does do not come across as necessary, and thus, we think that yearly targets are sufficient.

- **We think that the number of annual goals could be reduced and prioritised.** With the start of the new programme in April 2022 and the transition to the new organisational structure, **we suggest identifying and prioritising a few annual goals for each new 'theme' or area of work.**

- Linked to the point above, **we also suggest organising the annual goals into different levels.** This will give the monitoring report structure and align it with the programme results framework. For example: 1) outputs (e.g., working group meetings or training organised - what can be counted?); 2) uptake (e.g. communications statistics and feedback - the responses to activities and outputs); and 3) intermediate and longer-term outcomes.

- The last relatively quick fix is to **make the Programme 2022-2025 document and results framework the key document for designing and organising the quantitative and qualitative data collection** through the MEL system. We find the results framework developed for Fingo's strategy duplicates and complicates things.

Consolidate the monitoring and documentation of the contribution to intermediate and longer-term outcomes

As discussed in Section 4, most respondents want Fingo to pay more attention to monitoring and documenting the contribution to outcomes. This can be done in several ways. Below we suggest one way that is used by organisations that are applying an adaptive programming approach to their work. These suggestions do not include quick wins and will require some internal and maybe externally facilitated discussions.

- We **suggest adopting Outcome Harvesting**. Outcomes are defined in Outcome Harvesting as 'observable and significant changes in a social actors' behaviour that has been achieved and that has been influenced by our intervention'. Outcome Harvesting has been traditionally used as an evaluative method. Still, it is increasingly considered a monitoring tool to track and record changes or signs of change as they emerge during implementation.

- **We suggest discussing the potential benefit of adopting Outcome Harvesting**. This process could be led by the MEL team and identify MEL focal points in the units. These will be colleagues with some limited time dedicated to MEL work who will liaise with the MEL team and help keep track of the signs of change and contribution to outcomes.

- If the decision is made to adopt Outcome Harvesting, a first step would be **to design and set up an Outcome Harvesting log for recording signs of change**. The log should include a brief description of the change that has been observed, a statement of its significance, and a statement of the contribution of the programme. It can also include tags such as programme themes. A Google Form or similar could help with data entry to the log (see Annex 5).

- **Validate regularly the outcomes and signs of change recorded in the Outcome Harvesting log**. The validation of recorded observations, combined with additional harvesting ones, can take place once a year. This typically involves a facilitated discussion or workshop to organise and cluster the outcomes recorded in the Outcome Harvesting log with the help of the programme results framework and ToC. The next step would be to identify respondents within and outside of Fingo and conduct semi-structured interviews to validate the outcomes and report on them with confidence.

- **Time the harvesting and validation to inform the annual report.** While the recording of changes and outcomes is meant to inform the units (and new themes) how their work is progressing and what type of outcomes it is producing so that they can adapt the implementation based on evidence and learning, it should also inform the reporting to donor(s). Thus, the validation and harvesting workshop should be timed to take place before the annual report.

- **Develop capacity across units.** Adopting and tailoring Outcome Harvesting into the MEL systems of Fingo will involve some capability development within the MEL team. However, we know that in Fingo, there is a good degree of knowledge and experience about the key principles and terminology of Outcome Mapping, which informs Outcome Harvesting. Therefore, we think that investment in developing the capabilities for Outcome Harvesting will be limited.

- **Test and iterate the process**. Developing a new process typically requires some testing and adaptation based on learning and the resources available. We suggest designing and testing the tool and the process, and then tweaking it based on feedback and reflection.

Keep staff informed about the ways that monitoring data, analysis and learning inform decision-making

Currently, **the MEL system is perceived as flowing one way towards management**. Staff record data for management, but how that data is used (or not used) is not reported back to staff, i.e., feedback loops on the use of data are missing. Like learning without a mandate to change anything, reporting data without knowing how it is used can be frustrating for staff and typically does not motivate them to keep reporting.

As quick wins, we suggest:

- Regardless of whether and how the reporting system is tweaked or changed, we suggest that **the Senior Management Team regularly (e.g., quarterly) report back to staff on whether and how the data has influenced any decisions** or what other type of data they would need. Again, this does not have to be another big reporting task; just a few bullet points shared in staff meetings or internal news.

- Similarly, **the Board could (briefly) report back to management** about whether it has found the progress or other data provided by management useful for their strategic advisory work.

Increase and strengthen opportunities and spaces for cross-unit learning and reflection

Most respondents to the review would like to have more structured learning and sharing opportunities. These spaces and opportunities will expand the capacity and capability of the Fingo staff to create the results it wants to achieve through intentional and emergent processes. Learning happens all the time in an organisation, whether or not it is planned, resourced or coordinated. However, when it is structured, it can have two forms:

- **Emergent learning**: regular, ongoing learning processes integrated into programme implementation and designed to allow learning to emerge without prejudice. Such processes include collective and participatory sensemaking and/or after-action reviews.

- **Intentional learning**: discrete, time-bound learning activities targeted at answering specific questions, which may arise out of emergent learning, research, MEL or simply through the challenges of implementing the programme. Intentional learning processes can include learning events and research or synthesis studies.

As quick wins, we suggest:

- The **MEL team organise and facilitate a workshop to discuss with the Fingo staff the existing experiences with learning activities and ideas about learning for the new programme.** The workshop could include an exercise to cluster experiences, ideas and suggestions into *emergent learning* activities and *intentional learning* and begin a design of structured learning activities as part of the MEL system. This would form an annual learning cycle with links to the organisation's learning goals.

- **Develop learning goals for staff / new themes** for Fingo. This does not have to be a big or complicated exercise, but something that will give focus and clarity for learning and reflection. Choose a few (annual) themes or questions on which staff / new areas decide together to learn and reflect. This helps create accountability for and about learning and a measurement of the learning work.

Longer-term suggestions are:

- Discuss and consider, if there is interest and the resources are available, **the establishment of an internal learning group** led by the MEL team, with representatives from different units. This could be the same MEL team and MEL focal points described earlier. This team would be responsible for designing annual learning plans, including the following elements: 1) An annual plan describing learning priorities in the form of key learning questions and a learning process (or processes), including defining who will be involved, roles and responsibilities, what activities will take place and what outputs will be produced; 2) Implement the plan, including the production of internal and external learning products (e.g. blogs, interviews, podcasts, briefs, etc.); and 3) Review the learning process through an after-action review meeting with the unit (s) involved to reflect on the process, assess its usefulness and make recommendations for the following year.

- **As part of the learning, plan, design and test facilitated and structured learning and reflection sessions to help emergent learning.** While many people like to reflect together informally too, making learning sessions structured and facilitated will likely increase the diversity of views and improve the quality of analysis. Structured learning spaces are important as they help address cognitive biases. The three most common things that happen in group discussion are:

    - Discussion can make groups' views more extreme;
    - Groups tend to focus on what most people already know; and
    - Initial contributions can strongly sway group opinion.[15]

  People tend to jump to solutions before the problem has been properly diagnosed, addressed, and reflected on. On top of making learning sessions structured, assigning a 'red team' or 'critical friend' (as done in six-monthly sparring sessions) is a good mitigation technique.

- **We suggest discussing the pros and cons of different methods for structured learning to be tested in Fingo.** One method we want to suggest is the Portfolio Sensemaking protocol developed by Chôra Foundation.

  Portfolio Sensemaking is an iterative and structured conversation process that helps generate insights and evidence about the portfolio of activities that an organisation implements. These insights help inform decisions about the portfolio's elements and coherence so that it becomes more than the sum of its parts. Doing so complements (and is part of) other elements of the monitoring and evaluation system and can be a key element of the "L" of a MEL system.

  During a Portfolio Sensemaking workshop, staff members share and reflect on their work (projects, activities, initiatives, experiences). This process involves storytelling (people sharing the things they are doing, and their significance), question asking (explorative

15 This report from Institute for Government describes these and many of the common cognitive biases in a clear manner. Though the report focuses on policy formulation, its findings are widely applicable.

inquiry to extract new information and learning), and insight layering (taking a balcony perspective on the things we are doing to identify new connections, meaning and implications for the body of work the organisation is managing). This facilitated process produces the so-called *intelligence;* these are insights and new ideas for activities, services and products that were not there before, and that help make decisions and actions to continue exploring easy, and to influence a system and solve wicked complex policy and development problems.

Annex 1 – Review team composition

Arnaldo Pellini

Arnaldo is the co-founder of Capability Oy, a Finnish consultancy that focuses on designing MEL systems that support learning and evidence-driven strategic decision-making, as well as adaptation of development initiatives that address complex social and economic governance problems. He has 20 years of research and programme experience and extensive experience in context analysis, political economy analysis, and the design of adaptive MEL systems. He has extensive in-country experience, having lived, and worked in Southeast Asia for 15 years (Nepal, Cambodia, Vietnam, Philippines, and Indonesia). Arnaldo has worked with various international actors, including FCDO/DFID, DFAT, UNDP, GIZ, Swedish SIDA, USAID, the World Bank, and the Swiss Development Cooperation. He is a Research Associate at the Overseas Development Institute in London. Arnaldo has published extensively on the political economy of evidence use in policy and practice and adaptive development with the Overseas Development Institute, academic articles, book chapters, blog posts and opinion pieces. Arnaldo holds PhD in education and development from the University of Tampere.

Arnaldo had the overall lead for the assignment, and the coordination of inputs by the review team to produce the agreed deliverables. He will also be involved in the design of data collection and analysis tools, the review of English language documentation, conducting semi-structured interviews, coordinating the design of the Portfolio Sensemaking workshop and leading the production of the final report and the presentation of the findings to Fingo.

Tiina Pasanen

Tiina is an independent MEL consultant and a Research Associate at ODI. She specialises in MEL methods and practices. Her work focuses on the use and usefulness of M&E data and systems and how evidence and data can be integrated into organisational learning and decision-making. Her projects and roles range from acting as a long-term learning partner in diverse programmes to more short-term evaluation and quality assurance assignments. She has a mixed methods background and can conduct quantitative and qualitative research, including impact evaluations. She has written several papers and guidance notes on how to choose M&E tools and approaches, design M&E frameworks, and facilitate learning in large programmes. She also regularly blogs about MEL topics.

Tiina was responsible for reviewing the Finnish language documentation provided by Fingo, as well as co-designing and managing the key informant interviews and the final report production with Arnaldo.

Annex 2 - List of respondents

Internal interviews	
Juha-Erkki Mäntyniemi	Senior Management Team
Rilli Lappalainen	Advocacy unit
Salla Peltonen	Communication unit
Timo Lappalainen	Organisational development unit, Senior Management Team
Nora Forsbacka	Advocacy unit
Kalle Korhonen	Administration unit
Doris Hakkarainen	Communication unit
Outi Hannula	Learning unit, Senior Management Team
Elina Kokkonen	Administration unit, Senior Management Team
Annika Launiala	Advocacy unit, Senior Management Team
Emilia Runeberg	Advocacy unit
Johanna Harjunpää	Learning unit
Jaana Viirimäki	Learning unit
Mika Välitalo	Organisational development unit, Power Bank Team
Johanna Eurakoski	World Village Festival team

External interviews		
Liisa Laakso	Uppsala University	Chair of the Board of Fingo
Miia Nuikka	Solidarity Foundation	Previous member of Fingo Board
Auli Starck	Taksvarkki and Vikes	Fingo member organisation
Niina Ratilainen	Plan International Finland	Fingo member organisation
Elina Iso-Markku	Ministry for Foreign Affairs - Unit for	Desk officer for Fingo

	Civil Society	
Lilli Krause	VENRO (Umbrella organisation of development and humanitarian NGOs in Germany.	M&E manager

Annex 3 - List of programme documents reviewed

Document type	Title
Programme document	Fingo Strategy 2021-2024
Programme document	Fingo Programme 2022-2025
Programme document	Fingon Strategia 2018
Programme document/visualisation	Fingo muutosteoria / ToC (for previous strategy/programme)
Programme document	Fingon Ohjelma 2019-2021
Results framework	Fingon Strategian (2021-2024) Seurantakehikko
Results framework	Fingo Results Framework 2022-2025
Results framework	Fingon tuloskehikko 2020
Monitoring report	Examples of Neljannesvuosiraportti 2019, 2020
Reporting tool/monitoring report	Example of monthly reporting / Kuukausiraportti 2019-2020
Reporting tool/monitoring report	Examples of bi-monthly reports 2021 (including annual and six-monthly goals and six-monthly reflections)
Annual report	Fingo Toimintakertomus 2020
Annual report	Vaikuttamisyksikko - vuosiraportti
Annual report	UM Vuosiraportti
Report to Board, power point presentation	Toiminnanjohtajan katsaus
Guidance document	Vuosisuunnitelma
Guidance document	Vuosiraporttiohjeistus
Guidance document	Puolen vuoden suunnitelma

Guidance document	Puolen vuoden katsaus
Guidance document	Kahden Kuukauden Raportti

Annex 4 - Examples of PDIA tools

Figure 1 - An example of deconstructing a complex problem (Samji et al. 2018)

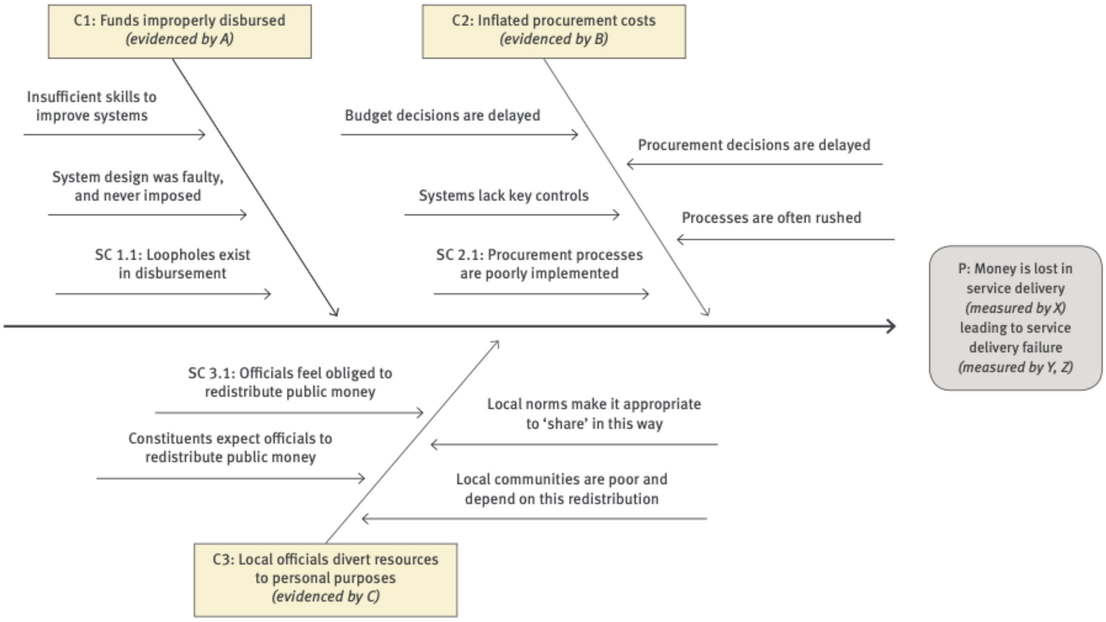
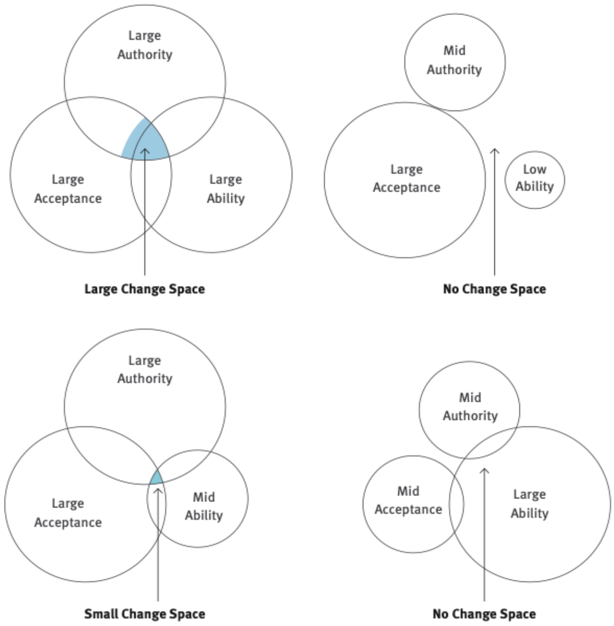


Figure 2 - An illustration of a basic triple-A change space analysis (Samji et al. 2018)

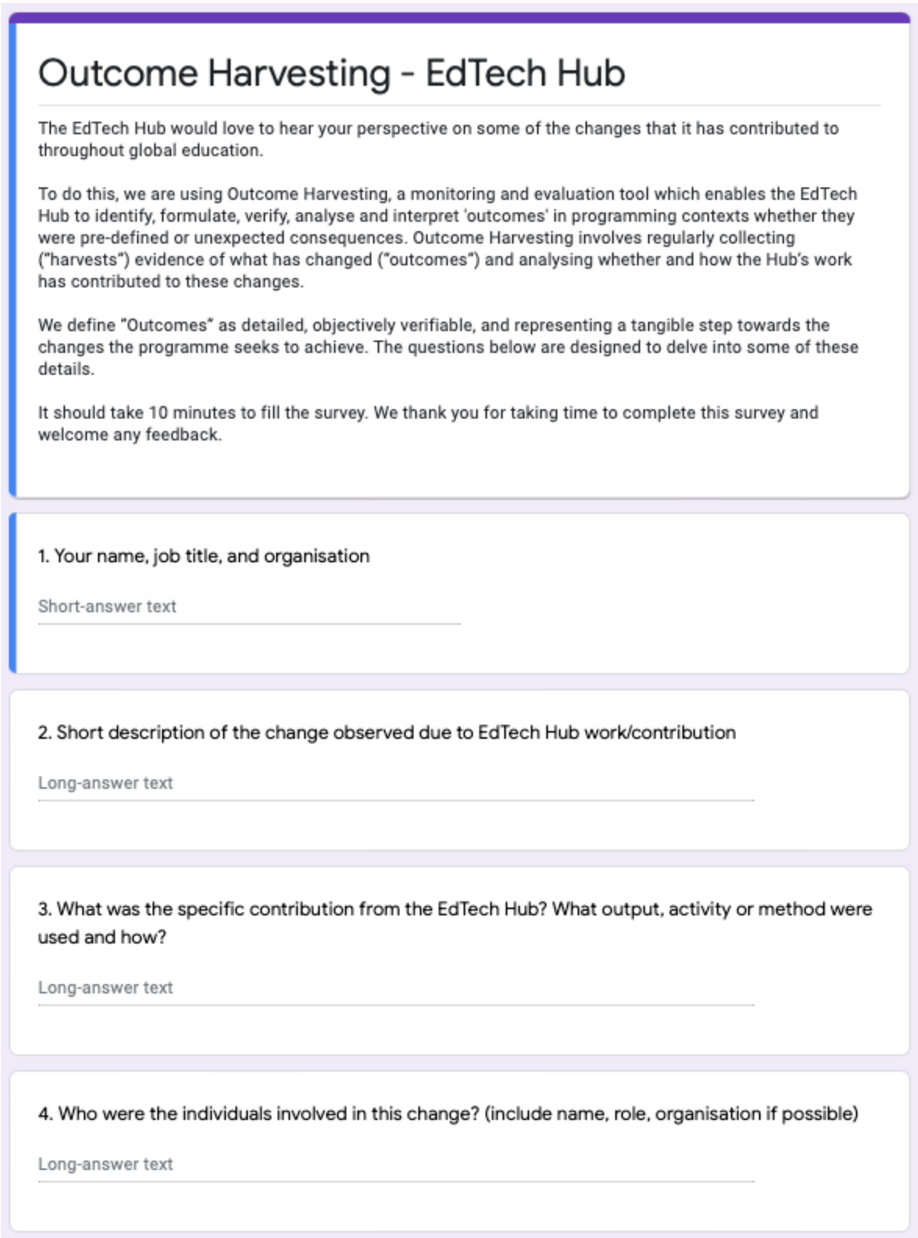


QUESTIONS FOR REFLECTION	AAA ESTIMATION *(LOW, MID, LARGE)*	ASSUMPTIONS
Cause 1:		
Overall, how much **Authority** do you think you have to engage?		
Overall, how much **Acceptance** do you think you have to engage?		
Overall, how much **Ability** do you think you have to engage?		
What is the change space for cause 1? (large change space, some change space or no change space) – AAA Venn diagram		

Annexe 5 – Screenshots of Outcome Harvesting tools

These are screenshots of Outcome Harvesting data collection tools that we have developed for other programmes and organisations. Please do not share widely.

Outcome data input Google Form



Outcome Harvesting - EdTech Hub

The EdTech Hub would love to hear your perspective on some of the changes that it has contributed to throughout global education.

To do this, we are using Outcome Harvesting, a monitoring and evaluation tool which enables the EdTech Hub to identify, formulate, verify, analyse and interpret 'outcomes' in programming contexts whether they were pre-defined or unexpected consequences. Outcome Harvesting involves regularly collecting ("harvests") evidence of what has changed ("outcomes") and analysing whether and how the Hub's work has contributed to these changes.

We define "Outcomes" as detailed, objectively verifiable, and representing a tangible step towards the changes the programme seeks to achieve. The questions below are designed to delve into some of these details.

It should take 10 minutes to fill the survey. We thank you for taking time to complete this survey and welcome any feedback.

1. Your name, job title, and organisation

Short-answer text

2. Short description of the change observed due to EdTech Hub work/contribution

Long-answer text

3. What was the specific contribution from the EdTech Hub? What output, activity or method were used and how?

Long-answer text

4. Who were the individuals involved in this change? (include name, role, organisation if possible)

Long-answer text

5. In which country did the change happen?

- ◯ Bangladesh
- ◯ Ghana
- ◯ Kenya
- ◯ Pakistan
- ◯ Sierra Leone
- ◯ Tanzania
- ◯ No country specific
- ◯ Other...

6 (a). When did the change happen (approx.)

Day, month, year

6 (b). Anything else to note about the timeline for the story of change?

Long-answer text

7. Does the change contribute to any of these Intermediate outcomes (taken from the Hub's Theory of Change)? (list options)

- ☐ Increase in evidence base in any of the five topics (Girls education, Data, Teacher Professional Develo...
- ☐ Improvement in dissemination and accessibility of evidence base to inform uptake.
- ☐ Increase in engagement with and between FCDO, World Bank and other actors on five topics
- ☐ Decision makers have a better understanding of key considerations in EdTech
- ☐ Not applicable

8. Which evidence topic does this story of change relate to? (list options)

- [ ] Data
- [ ] Girls
- [ ] Participation
- [ ] Personalized learning
- [ ] Teacher professional development
- [ ] Cross cutting
- [ ] Other...

9. Considering the EdTech Hub's aims*, how significant do you think the story of change is for the EdTech Hub?

*EdTech Hub Impact statement: Decision makers have access to, demand, and use evidence to spread and scale more effective, inclusive, equitable, and cost-effective use of technology within education systems

	1	2	3	4	5	
Not very significant	○	○	○	○	○	Very significant

10. What do you think this story of change means for the Hub and for the wider education system?

Long-answer text

11. Is there anything else you would like to share about this story of change?

e.g. are there any wider factors that have contributed to the change?

Long-answer text

Outcome Harvesting Log

Social Actor(s)	Country(s)	Quarter, Year (of Change)	Stage	Description	Type of Behaviour Change	Significance	ETH Contribution	Document	Link to documents
			seedling, outcome	*Describe in 1-2 sentences who, changed, what was the change, when the change occurred, where it occurred*	*1. Interest in Hub knowledge and methods* *2. Adoption of Hub knowledge and methods* *3. Change in policy/programming* *4. No change documented*	*Describe in few words why the change is important for progress towards programme objectives*	*Describe in few words what the Hub did to help in a small or large way the change*	*Title of the document mentioning/providing evidence about the change and the Hub contribution to it*	*Links to any document provic evidence about the change c Hub contribution to it*
the 40 most influential organisations and individuals undertaking or providing funding for research about EdTech in low shot iiddle income countries	Global	Q1, 2020/21	Seedling	Formation of BETER working group	Adoption of Hub knowledge and methods	Brought together 40 most influential individuals and institutions in EdTech research. This group meets once a month to share research instruments, discuss strategic direction and ensure alignment of efforts with reduced overlap. BETER has directly taken forward work to map current EdTech research and align surveys focusing on COVID-19 impacts. This work will ensure the global community better responds to the crisis over the coming months Output indicator 6.1 - Number of champions of change engaged with the Hub communities of practice (Cumulative)	Hub colalboarted with Digital Pathways Oxford The EdTech Hub identified that there was a lack of coordination across global EdTech research in response to COVID-19. The Hub established the BETER group and we meet once a month to share research instruments, discuss strategic direction and ensure alignment of efforts with reduced overlap.	Hub Quarterly Report Apr-Jun 2020	p10 and p20 https://drive.google.com/drive ders/17gBZCn_lvaFVzidjG7gL 7zzRgg
Telecom actors - Salaam / Rashan / Noon Telecom	Afghanistan	Q1, 2020/21	Negative outcome	Intending to bolstering super Lo-Fi tech in Afghanistan. Telecom actors did not engage with the Sandbox	No change documented yet	The Sandbox aimed at identifying a technology psrtners interested in working with the Sandbox	Sandbox team attempted to establish contract with different telecom actors and a software organisation (Netlinks)	Slide deck	https://docs.google.com/pres d/1e5ikX7qdiTG2DuwWcsRffF RvFp_tFKCxBWo/edit#slide= 27d31d_0_153
Educators Internatioı	Global		Seedling	Call for ideas funded orgs: Educators International chosen as successful intervention	No change documented	Significance capture in other tabs	The Hub held a Call for Ideas for innovative interventions to respond to Covid-19. In June 2020, the first 6 successful projects were chosen.	EdTech Blog	https://edtechhub.org/2020/0 porting-innovation-in-the-tim covid-what-weve-done-and-w well-do-next/?utm_source=rss&utm_r =rss&utm_campaign=support innovation-in-the-time-of-cov weve-done-and-what-well-dc