IYF Measurement, Evaluation, Research and Learning Policy

Introduction

IYF's *Measurement, Evaluation, Research and Learning (MERL) Policy* describes the approaches and standards for measurement, evaluation, research, and learning at IYF. The MERL Policy was established to ensure the delivery of standardized high quality MERL services and products across IYF programs and over time and to support high-quality program delivery. This policy aligns with other IYF guidance and policies, such as IYF's Gender Equality and Social Inclusion Policy, IYF's Transformation 2025 Strategic Plan and our Learning Agenda, and is implemented during each phase of the project life cycle.

IYF's Approach to MERL

Commitment

IYF is committed to MERL to drive our goal to connect young people with opportunities to transform their lives. Measurement and data ensure this is not just a lofty goal. For example, because expanding youth economic opportunities and livelihoods is one of our strategic objectives, when IYF helps youth develop the leadership, technical, and life skills to earn a livelihood, we measure those skills and assess those changes in livelihoods. We are thereby transparent and accountable for our investments.
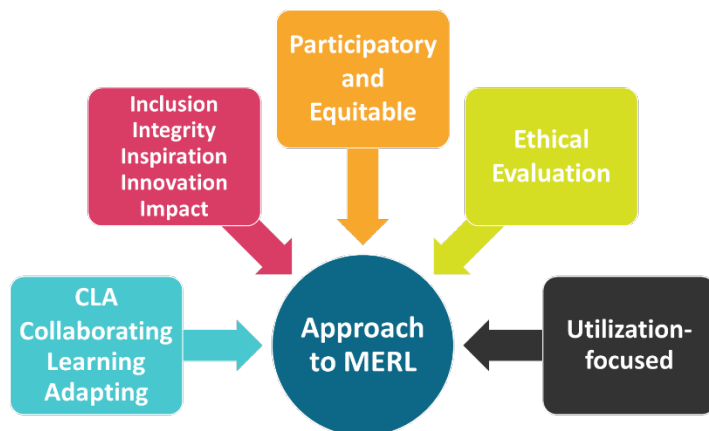

Principles and Approaches

IYF's approach to MERL reflects both our values—Inclusion, Integrity, Inspiration, Innovation, and Impact—and the American Evaluation Association's Guiding Principles for the professional ethical conduct of evaluators. We use **participatory measurement methods**, engaging young people and partners throughout the process, ensuring our projects address youth-defined problems within the local context while strictly protecting the privacy of those we serve. Supporting our deeply held commitment to ensure broad social inclusion and address systemic inequities, we use **equitable evaluation approaches**, prioritizing evaluation as a tool to benefit the young people and communities we serve. IYF is committed to using data to improve our programs, ensure diverse voices, and reveal and solve access inequities, particularly for society's most vulnerable members. Our evaluation questions and approaches are **utilization-focused**, designed for their usefulness to the intended users, especially our partners and the young people that are at the center of IYF's work.

At IYF, program measurement and evaluation reflect an institutional commitment to collect locally- and globally-relevant, high-quality data. Collaborating, learning and adapting (CLA) principles and processes are woven into our work from project outset to close. We collaborate with partners to use data to evaluate and adapt programs, and to leave existing MERL systems stronger than when we arrived.

MERL Policy Components

IYF's MERL Policy is comprised of three components: 1) essential MERL technical areas, 2) cross-cutting themes, and 3) MERL processes.
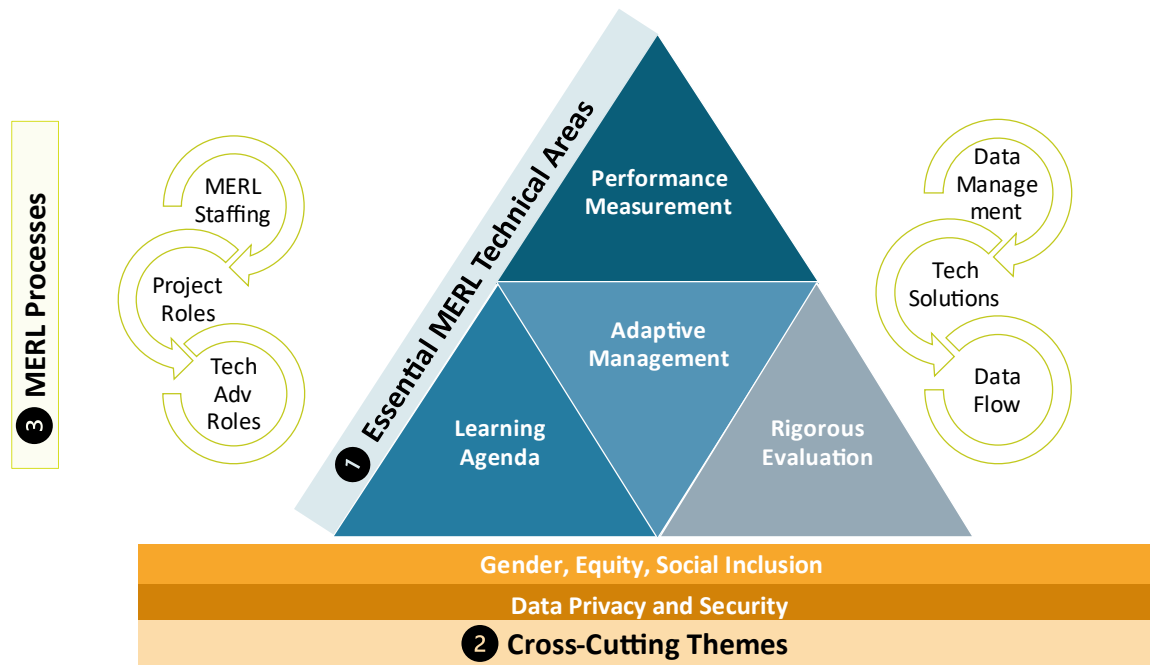
Technical Areas

Learning through adaptive management

IYF is a learning organization, with structures and processes to make learning part of our daily routine. This starts by incorporating CLA practices to make iterative learning routine at the **project level**—examining available data and using adaptive management to make project changes. This extends to the **organizational level**, gathering iterative learning across projects, examining learnings in relation to our strategic objectives and global trends, storing them in our Knowledge Hub[i] for easy-access and adjusting our evolving technical thinking according to new findings. IYF's Project Learning Guidance outlines methods to systematically integrate CLA into projects using recurring **Pause and Reflect** sessions. This includes: 1) specifying frequency, indicators, data sources and attendees for sessions, 2) routinely implementing reflection sessions, and 3) documenting the products of reflection, including action items.

Learning Agenda

A learning agenda is a fundamental element of a robust MERL practice. Through our diverse projects, IYF pursues an ambitious institutional learning agenda, addressing the high priority Positive Youth Development (PYD) and systems change[ii] questions of our time. Each project creates a learning agenda according to the goals and scope of the project and aligned with IYF's institutional learning agenda. Taken together, the learning questions, activities and products provide actionable information about performance and guide an iterative process of internal learning and improvement crucial for effective day-to-day management and to refine IYF's technical and programmatic approaches.

Rigorous Evaluation

IYF is committed to learning from every project and integrating rigorous external evaluations into projects where feasible to advance IYF approaches and the field of youth development. Evaluations include formative, process, summative and impact evaluations, the use of mixed methods, and the use of flexible and exploratory approaches such as Outcome Harvest and Developmental Evaluation. IYF employs a set of standard tools to assess youth, trainer, employer, organization and partnership-level outcomes, designed to address IYF's key learning questions.

Agency-Level Measurement

IYF uses a set of agency-level indicators to describe progress toward our three strategic objectives: Advance Youth Agency, Expand Economic Opportunities, and Support Systems to become more Youth Inclusive and Youth Responsive. Each project measures all relevant strategy-level indicators and enters data quarterly into IYF's centralized reporting system. These data are used for agency-level measurement and reporting and for performance improvement, and are additional to any metrics required by funders in specific award agreements. Indicators are disaggregated by age, gender identity, ability status and race/ethnicity, as relevant, to monitor and adjust equitable access to program services and benefits.

Project Performance Measurement (Project MERL Plans)

Each project has a comprehensive performance measurement plan (PMP) aligned with the project theory of change and reflecting the logical links between key project activities and the highest-level outcomes within the project scope. The PMP includes a list of performance indicators, performance targets, indicator tracking table, performance indicator reference sheets, a data quality assurance plan, an evaluation plan, the learning agenda, and a learning activity plan. The set of indicators include a) all donor-required indicators for routine reporting; b) relevant institutional indicators; c) indicators required for mid-course corrections to improve program effectiveness; and d) indicators to ensure equitable project access and reach.

Cross-cutting themes
Gender Equity and Social Inclusion

Measurement and evaluation are key to assessing progress on IYF's commitment to gender equity and social inclusion (GESI). Each project selects indicators to monitor equitable project access. At a minimum this requires disaggregating key output and outcome indicators by gender, ability status, ethnicity and age subgroups, reflecting on the data at least quarterly, and implementing adjustments to improve equitable access to project services and benefits. These are in addition to participant segmentation required by the donor. Projects will implement learning activities to track achievements of GESI interventions aligned with project goals and scope, monitoring the gaps between demographic groups and will regularly report these results.

Data Privacy and Security, and Research Ethics

Data entrusted to IYF by program participants and partners are protected by IYF's agency-level guidance to ensure General Data Protection Regulations (GDPR) awareness and compliance. As data guardians, IYF staff implement procedures to manage data per the GDPR framework and according to IYF's data security and privacy policies. This includes being fully aware of donor- and country-specific data privacy

and security requirements, and establishing strict data protection expectations with consultants and monitoring compliance.

MERL Processes

MERL Staffing and Technical Support

Key to implementing rigorous project and institutional MERL is allocating the right human resources and the right budget. Each project assigns the MERL role to at least one defined staff position and budgets according to globally-accepted standards[iii] to fund both MERL activities and human resources. Project MERL Leads are responsible for the day-to-day implementation and refinement of the PMP and quarterly and annual reporting to donors. MERL Technical Advisors provide technical support, defined and planned in close collaboration with Project MERL Leads. MERL staff across the organization contribute to external youth development and life skills measurement groups and establish IYF's technical leadership in PYD measurement.

Data Management and MERL Technology Solutions

Routine project data are collected using digital platforms to improve efficiency and data quality. IYF uses Salesforce to manage and store institutional data and FormAssembly, an online form builder that integrates directly with Salesforce. IYF also uses the learning management system Cornerstone On Demand to make online curricula and training available. Data from these resources are stored in Cornerstone and integrated with Salesforce.

Working with Partners and Consultants

IYF's MERL Policy is relevant whether we are the lead agency for an award, whether we are a sub-recipient to a prime organization responsible for MERL, or whether we hire consultants to implement MERL for a project. In all cases IYF shares and discusses our MERL policy with project partners to ensure that the contract aligns to IYF's MERL principles, standards, and approaches. In particular, IYF ensures that proposed and ongoing data collection and storage practices employ ethical procedures and data security. IYF MERL staff work closely with prime agencies and consultants to find ways to incorporate indicators for agency-level measurement, include key disaggregates (e.g., gender, ability status, age) and create plans to regularly share relevant data. IYF MERL staff will also work with partners to incorporate into project workplans learning questions and activities that align with IYF's learning agenda.

References

American Evaluation Association's Guiding Principles for the professional ethical conduct of evaluators.

USAID's CLA toolkit: https://usaidlearninglab.org/cla-toolkit

PYD measurement toolkit: USAID's PYD Measurement Toolkit

USAID's comprehensive Performance Management Plan Toolkit

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[i] A key component of IYF's knowledge management system on the Salesforce platform
[ii] See for example Youth Systems Collaborative
[iii] See for example https://www.usaid.gov/project-starter/program-cycle/pmp/pmp-budget and https://www.civicus.org/monitoring-toolkits/toolkit/me-capacity-checklist-toolkit/