



# Monitoring, Evaluation, Research and Learning Strategy



With support from:



**2023-2027**

## Abbreviations and Synonyms

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MERL	Monitoring, Evaluation, Research and Learning
CLA	Collaborating, Learning and Adapting
JMERC	JM Education and Research Centre
ToC	Theory of Change
ToTs	Training of Trainers
SOPs	Standard Operating Procedures
PLA	Project Learning Agenda
CS	Collaboration Strategy
MIS	Management Information System
BAR	Before Action Review
MoES	Ministry of Education and Sports
GoU	Government of Uganda
TVET	Technical and Vocational Education and Training

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# 1. Introduction

The integration of monitoring, evaluation and research with the Collaborating, Learning, and Adapting approach guides project activities. This aids in assessing progress, measuring outputs and outcomes, identifying effective strategies, and documenting lessons learned. The aim is to have an evidence-based programming for improvement and decision-making, which is aligned with JMERC's this MERL strategy is pivotal in achieving JMERC strategic goals and objectives. Therefore, this strategic framework is pivotal this MERL strategy is pivotal in achieving JMERC strategic goals and objectives.

JMERC has developed a Monitoring, Evaluation, Research, and Learning (MERL) strategy, encompassing an introduction to MERL, its significance, five strategic

priorities with related indicators, standards, and the methodology for conducting MERL, including collaboration, learning, and adaptation approaches.

## 1.1. Organisational Background Summary

JM Education and Research Centre (JMERC) started informally as a team of educators with a common goal of improving the quality of learning outcomes and girl-child and youth empowerment in Uganda in 2019. In January 2020, JMERC was registered as a non-for-profit organisation in Uganda with offices in Kampala but its programme activities spread across the country – with a focus on rural and urban poor communities.

### Vision

A world where all children and youth learn, achieve and thrive



### Mission

We provide a school ecosystem of support to uplift learners' life-outcomes with a focus on intervention for students, teachers, school leaders and caregivers



### Core Values

**Hope** – Optimism/Aspiration/Assurance/light at the end of the tunnel/  
Promise/Longing

**Collaboration** – Partnership/Alliance/Teamwork/Cooperation/ Networking

**Dependability** – Trust/evidence-based/reliability/integrity

**Audacity** – Courage/Heroism/Guts/dynamism/Valour/Confidence

## 1.2. Significance of Monitoring, Evaluation, Research and Learning (MERL)

**M**onitoring, Evaluation, Research and Learning is critical in the generation of evidence for effective project design, tracking and measuring of performance towards adaptive and strategic results management and accountability to various entities, stakeholders and Donors. Through the MERL strategy framework, JMERC will maintain a shared definition and understanding of various approaches, tools and indicators that will enable relevance, efficiency and effectiveness of programme delivery. Specifically, JMERC's MERL work will ensure: Improved program design and delivery; Improved data quality and fidelity; Increased learning, sharing, adaptation and advocacy including contribution to policy review and change; Increased contribution to the global evidence on various areas such as Girls' Education, Foundational Learning, Social and Emotional Learning and youth empowerment.

The aim is to emphasize the significance of using data-driven evidence in decision-making for education and development at personal, organizational, local, national, and international levels. The primary goal is to improve data collection for learning, monitoring, evaluation, and organizational growth, drawing from global knowledge. In JMERC, MERL comprises **Monitoring** for measurement, **Evaluation** for impact, **Research** for evidence generation

through documentation, and **learning** for knowledge management to enhance adaptation. This framework will efficiently guide programming, foster learning, enhance knowledge, and maximize the impact of JMERC initiatives. It clarifies what MERL entails within JMERC, outlines strategic priorities, key indicators, and standards. It also explains why MERL is important, how it will be conducted, and who the various users will be.

This Framework aligns with JMERC policy and will be applied throughout the project cycle, including design, implementation, monitoring and evaluation:

- It mandates core JMERC staff to receive basic training in monitoring, evaluation, research and elementary statistics.
- It establishes a Learning Agenda that extends beyond project-specific plans.
- It requires all JMERC projects to develop a Theory of Change, Log-frame and Performance Monitoring Plan at the project's outset for effective MERL design and implementation.
- It ensures JMERC contributes to policy formulation and global knowledge on research implementation.

### 1.3. Strategic Priorities

At the core of the multi-year JMERC strategic plan [2023-2027], there are a set of five strategic priorities with outcomes set for each priority and they include;

1. Girls' Education and Empowerment
2. Life-skills and Values for Youth
3. Schools and Community Engagement
4. Institutional Internal Development
5. Institutional Capacity to Scale

JMERC views education as the ultimate objective of every cultural and socio-economic endeavor. Education goes beyond mere schooling, training sessions and or information campaigns. It involves introducing individuals and communities to the complete reality of life, understanding its significance and appreciating the value of things. This process nurtures individuals to take responsibility for improving their own lives and the lives of others.

Despite Uganda's efforts to align with various national and global goals, its education system faces numerous challenges. Primary education experiences low retention rates and there are limited opportunities for students to transition to post-primary education including secondary and technical and vocational education and training (TVET). Additionally, there is a significant shortage of infrastructure at all education levels with high pupil-to-classroom ratios such as 135:1 in primary and 87:1 in secondary schools. Due to the shortage of teachers and infrastructure, key efficiency indicators like Pupil Teacher Ratio, Classroom Teacher Ratio and Pupil Stance Ratio do not meet national standards for delivering quality education. Furthermore, girls face barriers to accessing primary, secondary and post-secondary education thus hindering their ability to learn effectively.



### 1.3.1. The Five Strategic Priorities and their Outcome levelled Indicators

**Strategic Priority 1 - Girls' Education and Empowerment:** Social and emotional wellbeing is an enabler to effective learning, achievement and thriving. Therefore: if girls develop social and emotional skills; if girls develop the ability to make informed decisions about their SRH; and if schools and communities develop supportive systems and structures; then every adolescent girl and young woman in Uganda will be socially, emotionally and intellectually empowered to learn, achieve and thrive.

**Strategic Priority 2 - Life-skills and Values for Youth:** Under this strategic priority, the work focuses on supporting youth to be life-long learners and being prepared for the world of work. If youth develop social, emotional learning (SEL) skills; and if teachers are trained and mentored to teach and conduct formative assessment in a way that nurtures students' SEL competences; and if youth are trained on entrepreneurship and work readiness; then every youth in Uganda will become a life-long learner, well prepared for the world of work.

**Strategic Priority 3 - School and Community Engagement:** Supportive schools and communities enable effective learning for all and girls' empowerment: If teachers use learner-centered and gender-responsive teaching-learning approaches; and if teachers use formative assessment in a way that is gender responsive and nurtures

students' SEL competences; if School leaders create school cultures, structures and systems that support learning, gender empowerment and wellbeing; and if Caregivers support children's learning at home, and social-emotional wellbeing and collaborate with schools then schools and communities will provide an ecosystem that supports effective learning for all and girls' empowerment.

**Strategic Priority 4 - Institutional Internal Development:** Access to resources, sustainable funding and good governance are key enablers to institutional internal development: Therefore, if JMERC has the operational and management staff – well trained to implement our mission; if JMERC receives sustainable funding; and JMERC is well managed and governed, then JMERC will be develop the internal capacity to effectively promote the right to quality and girls' empowerment in Uganda.

**Strategic Priority 5 - Institutional Capacity to Scale:** Effective provision of a programme is a key enabler and indicator of institutional capacity to scale: Therefore, if JMERC's school-wide ecosystem model is tested and adapted by the Ministry of Education; if JMERC has established strong partnerships and networks required to grow its impact; and if JMERC is able to impact, one million girls and youth, then JMERC will have developed its capacity to scale its school ecosystem model.



**Table 1: Showing the Outcome Levelled Indicators.**

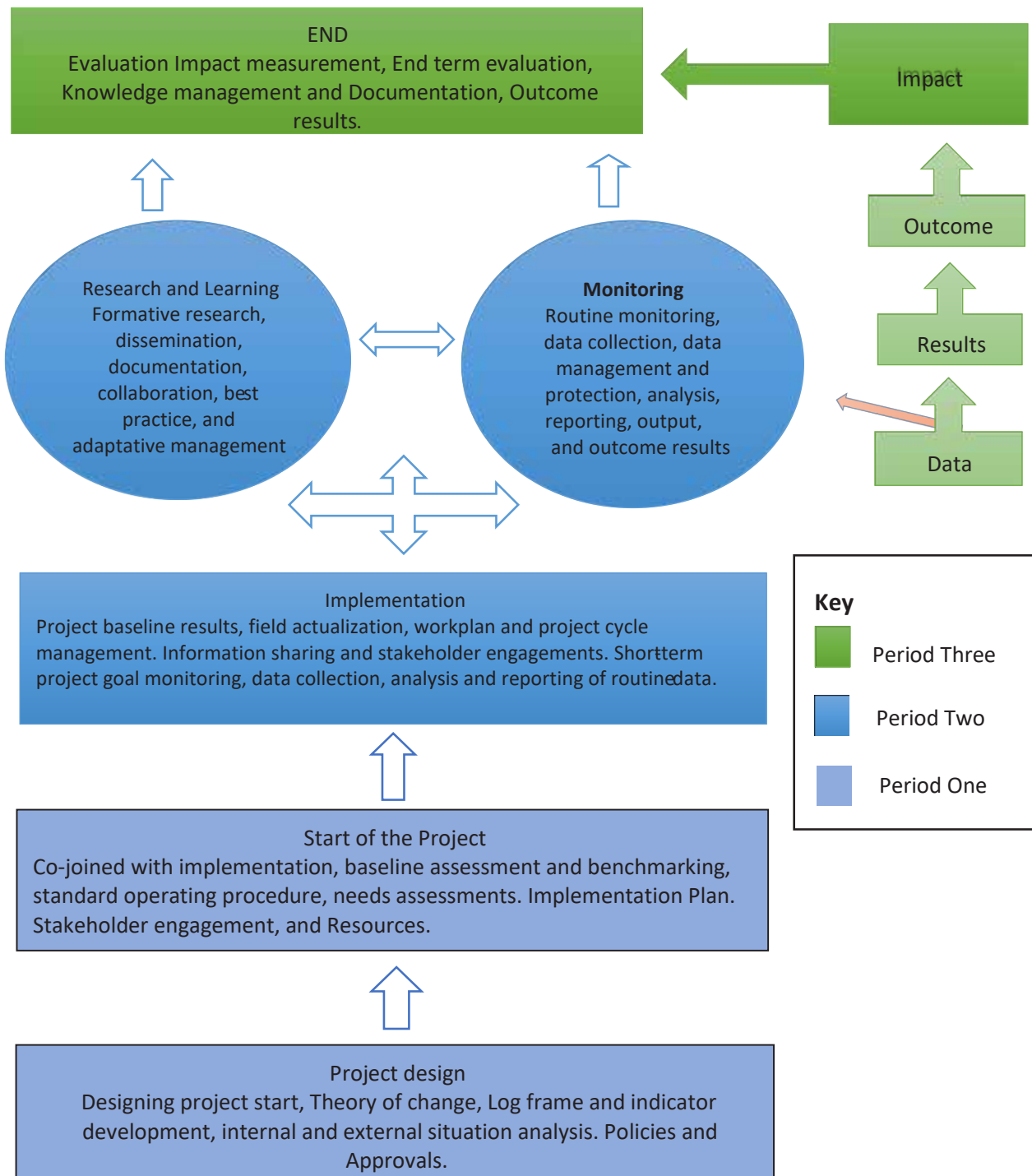
Strategic Priority	Ultimate Outcome	Intermediate Outcomes
<p><b>Priority 1:</b></p> <p>Girls' Education and Empowerment</p>	<p>Every adolescent girl and young woman in Uganda is socially, emotionally and intellectually empowered to learn, achieve and thrive</p>	<p>1.1. Improved social and emotional competencies (required for wellbeing) among girls.</p> <p>1.2. Improved decision-making by girls about their sexual and reproductive health (SRH)</p> <p>1.3. Developed Community and or School structures and systems in which every girl and young woman can learn, achieve and thrive</p> <p>1.4 Increased number of girls completing the school cycle</p>
<p><b>Priority 2:</b></p> <p>Life-skills and Values for youth</p>	<p>Every youth in Uganda is a life-long learner and well prepared for the world of work.</p>	<p>2.1. Improved social-emotional skills among youth.</p> <p>2.2. Improved teachers' ability to nurture and assess social-emotional skills</p> <p>2.3. Improved entrepreneurship and work-readiness skills among the youth</p> <p>2.4. A vibrant movement for girls' education in Uganda and the region</p>
<p><b>Priority 3:</b></p> <p>School and Community Engagement</p>	<p>Schools and communities support effective learning for all.</p>	<p>3.1. Increased use of learner-centered and gender responsive teaching, assessment tools and methodologies.</p> <p>3.2 Improved foundational learning skills among children</p> <p>3.3.A contextualised SEL framework</p> <p>3.4. Improved support towards children's social-emotional wellbeing and home learning by the caregivers.</p>
<p><b>Priority 4:</b></p> <p>Institutional internal development</p>	<p>JMERC is adequately resourced, sustainably funded, and well-governed to effectively promote the right to integral education and girls' empowerment in Uganda.</p>	<p>Context based for JMERC:</p> <p>4.1. JMERC staff have the capacity to fulfil the organization's mission</p> <p>4.2. JMERC receives and utilizes sustainable funding</p> <p>4.3. JMERC management and governance are well aligned to its vision and mission</p>
<p><b>Priority 5:</b></p> <p>Institutional capacity to scale</p>	<p>JMERC is well positioned to effectively and efficiently scale its programs.</p>	<p>Context based for JMERC:</p> <p>5.1. JMERC's school-wide ecosystem model is tested and adapted by the Ministry of Education</p> <p>5.2. JMERC has established strong partnerships and networks required to scale its impact</p>

## 2. Monitoring Evaluation Research and Learning Implementation

MERL provides the information needed to assess and guide the project strategy, ensure effective operations, meet internal and external reporting requirements, and inform future programming. This is an integral part of project design as well as project

implementation and completion. MERL strategic framework will be conducted following different stages; program design, implementation and at the end. This is described in the theoretical framework diagram and further detailed below

**Figure 1: Illustration of the MERL Implementation Framework.**



## 2.1. Period One: Project Design and Start

The process of monitoring and evaluation is initiated during the project's design phase-period, which continues upon approval, at the beginning of the project. Once project approval is documented and approved through the board, the designing period commences. This involves creating a theory of change, followed by a log frame. The theory of change compares existing similar projects and is directed towards the strategic plan, internal and external reports, evaluations, and a situational analysis. During this period, different stakeholders are engaged, consulted, and new contextual data is reviewed to inform adaptations if necessary. The MERL lead and given heads of departments are offered as needed a ToC and Log frame training as an approach not only for design but also implementation. See annex for Theory of change diagram

## 2.2. Period Two: Implementation

### 2.2.1. Baseline Assessments

At the start of implementation, a baseline assessment also known as a pre-assessment, this is conducted of and when feasible. This can also be combined with context assessments for the intended or similar targeted population. Baselines can either be conducted internally by JMERC MERL teams or externally as needed/ design approach. The baseline is conducted with and aim of, establishing baseline values of indicators at the impact, outcome, and output levels, aligning with the project theory of change; enabling the project set realistic targets and planning; collecting

contextual qualitative information to aid the implementation strategies. These can include assumptions, risks and rationales. The baseline is conditioned to cover all dynamics through mixed methods approaches. Qualitative methods may include key informant interviews, focus group discussions, contextual situational analysis, case studies, observations, quantitative methods may include structural interviews, surveys, statistical analysis and secondary data analysis. This should be well structured with clear terms of references. All the baseline assessments completed are documented and results with summarized reports are archived with MERL department assessment repository.

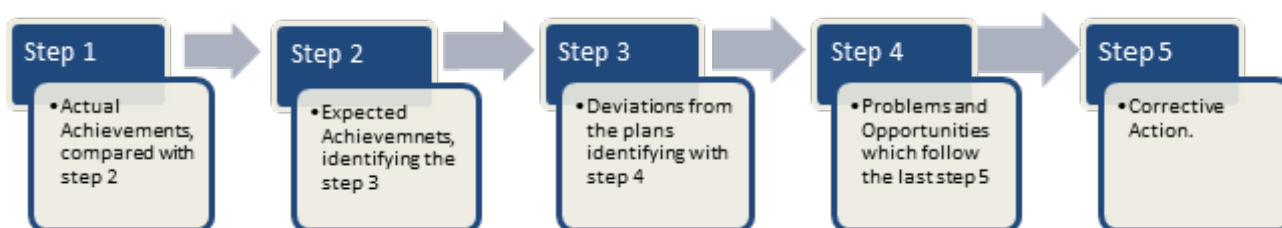
### 2.2.2. Monitoring and Reporting

Monitoring plays a crucial role in the project management cycle, being an essential aspect of day-to-day management. It focuses on gathering information that allows management to identify and address implementation issues and track the project's progress. Monitoring involves assessing activity implementation processes, ensuring adherence to programming standards and the quality of work, examining the efficient use of resources, and evaluating the results achieved. The objectives of monitoring may include but not limited to:

- **Verification of Objectives:** Monitoring helps verify how project objectives can be achieved, ensuring that the project stays on course and aligns with its intended goals.

- **Analysis of Implementation Changes:** Monitoring analyzes changes in the implementation process, considering shifts within stakeholders and policies. This analysis helps in understanding evolving dynamics and adjusting strategies accordingly.
- **Corrective Actions:** Monitoring provides insights that enable the project team to take corrective actions promptly. By identifying problems early on, the project can make necessary adjustments to ensure successful implementation and achievement of its goals.

**Figure 2: Illustration of the Monitoring Process**



Monitoring and reporting processes should utilize a collection of tailored tools that are specifically designed to align with program activities and objectives. These tools should be organized into categories to address various levels of monitoring, encompassing both process and output monitoring. This comprehensive approach ensures that the monitoring and reporting methods are finely tuned to the specifics of the program, allowing for a detailed and accurate assessment of progress and outcomes.

**Reporting** plays a crucial role in conveying information, findings, and results obtained through the monitoring process to relevant stakeholders. It involves presenting data, analysis, and updates on progress in a clear, structured, and meaningful manner. Reports serve as a snapshot of the current status, achievements, challenges, and recommendations related to the monitored project or activity. Multiple

stakeholders at different levels, including field implementers, advisory teams, and management, contribute to the development of these reports.

The importance of reporting lies in:

- **Promoting Transparency and Accountability:** Reporting fosters transparency and accountability by openly sharing information about the project's status, ensuring stakeholders are aware of its developments.
- **Facilitating Learning:** Reports capture best practices and recommendations, facilitating learning. This knowledge informs decision-making and future planning, promoting continuous improvement.
- **Informing Decision-Makers:** Reports inform decision-makers, stakeholders, and the public about the progress and outcomes of initiatives, enabling them to make informed decisions.

Reports come in various types, differing in frequency (weekly, quarterly, semi-annual, and annual) and formats (detailed written documents and visual presentations). The project is expected to generate different categories of reports as needed, such as technical reports, progress reports, study/assessment reports, management/administrative reports, and financial/audit reports. Additionally, there are other donor-

required reports like inception/baseline, midterm, end-term, and event-specific or bi-annual reports. When developing these reports, it is crucial to review reporting requirements, templates, and information needs. These may be influenced by donors, the project's context, government regulations, and other reporting structures, ensuring that the reports are tailored to meet specific criteria and expectations.

### 2.2.3. Data Quality Assurance

The data quality assurance, data management, and safeguard procedures outline how the Project will establish systems to store and preserve original files and project records. This includes protocols for database management, including backup procedures, as well as guidelines for data entry. Additionally, these procedures encompass data management protocols and coordination mechanisms across various project components to ensure consistency and accuracy in handling project-related information. This is focused on insuring data;

- **Validity:** Data must accurately represent the intended results they aim to measure. Validity is upheld by ensuring that all data collection tools include necessary details for disaggregating data during reporting, such as gender, geography, age/age groups, etc.
- **Precision:** Data should provide an accurate reflection of performance and support decision-making at the appropriate levels. Precision is maintained by training staff on tool

usage, incorporating error checks in the Management Information System (MIS), and routinely cleaning submitted data before analysis.

- **Timeliness:** Data should be delivered promptly to inform management decisions. To ensure timely submission, all enumerators, whether project staff or external enumerators, are expected to submit routine activity data to the MERL team for consolidation and upload into the Project database.
- **Reliability:** Data should exhibit stable, consistent collection and analysis processes over time. Reliability is achieved by developing tools with standardized guides, conducting pretests, and adjusting as needed to eliminate inconsistencies in data collection.
- **Completeness:** Data should be collected and entered in its entirety. Completeness is ensured through training and refresher courses on tool usage and verifying data for completeness before it is uploaded into the database.

## 2.2.4. Data Management

In managing data, projects need to establish a clear data management protocol. This protocol should outline roles and responsibilities, specifying who verifies data at the field level, assigns unique identifiers, enters and uploads data into the database, extracts data for analysis, and determines the actions based on the analysis results. Most data points should originate from the targeted participants. Data collection forms should be uploaded via mobile phone applications or tablets into project-based Management Information Systems (MIS) like Kobo Collect, ODK, Survey CTO, or customized MIS platforms for storage. This information serves as the basis for routine review meetings with the project team, reporting activities, and facilitating learning processes.

**Access to Data:** Maintaining strict adherence to minimum ethical standards, especially regarding the confidentiality and integrity of data, is of paramount importance. This commitment should be upheld through the implementation of a secure data sharing protocol. That is establishment of key data sharing points and policies which control and ensure data safety. Both paper and electronic data should be stored for at least 6 years. Any data stored beyond ten years will be out dated and should be destroyed. Externally, the project signs a specific data

management and sharing agreement with interested key stakeholders. The agreement should clearly state the procedure for sharing data or information collected by both parties. All key stakeholders who will interact with the data shared should be bound by the signed agreement.

For all research studies, evaluations, and learning initiatives undertaken, it is essential for the project team to create a dissemination strategy. Once approved, results from performance monitoring, special studies, and evaluations should be shared with key project stakeholders. These findings should be disseminated using various methods outlined in the dissemination strategies. Special study's findings should be aimed for publication in peer-reviewed journals. Additionally, dissemination efforts should include participatory workshops, national presentations, case conferences, and internal project reviews. These diverse channels are crucial for sharing findings, lessons learned, and best practices. Importantly, dissemination methods need to be tailored to suit different stakeholders, including international donors, development partners, and other relevant entities. Customizing the dissemination approach ensures that the research outcomes reach and benefit the appropriate audiences effectively.

## 2.3. Collaborating learning and Adapting [CLA]

This encompasses the Collaboration Strategy (CS), the Project Learning Agenda (PLA), and the Adaptation Approaches. Presenting an integrated approach to research and learning while doing at the program level, incorporating monitoring data and analysis alongside a structured framework for regular reflection, feedback loops, and adaptive

management. This further outlines the mechanisms the Project will employ to collaborate with various stakeholders, clearly defining the purpose of these collaborations. The CLA design allows for scheduled pause-and-reflect opportunities at different intervals: weekly, monthly, quarterly, and annually, both internally and among Project stakeholders,

including the broader served communities. Additionally, the Plan facilitates learning at specific milestones, such as before and after interventions, during the project life cycle.

Beyond the scheduled sessions, the CLA Plan enables the Project to rigorously test assumptions, identify improvement opportunities, challenge hypotheses, and

modify activities and delivery methods. These practices align with the core principles of adaptive management, incorporating techniques like scenario planning and context monitoring processes. This dynamic approach ensures ongoing learning and enhancement throughout the Project's implementation.

### 2.3.1. Collaboration

Under collaboration, the project will map and list out the various stakeholders with whom the project will collaborate showing a clear purpose for the collaboration. This list should be reviewed annually to assess progress, revise stakeholder contacts and levels of engagement, and determine whether collaboration objectives and tactics are supporting the implementation of the Project. By following these steps and maintaining a dynamic approach to stakeholder collaboration, projects can adapt to changing circumstances, ensure their efforts are aligned with organizational objectives, and maximize their chances of success; this can be broken down as;

- **Stakeholder Identification:** At the beginning of a project, it's crucial to identify all the stakeholders who might be affected by the project or who can influence its outcome. Stakeholders can include internal team members, external organizations, government bodies, community members, customers, and more. Each of these stakeholders might have different levels of interest and influence in the project.
- **Clear Purpose:** For each stakeholder identified, there should be a clear understanding of the purpose of collaboration. What does the project aim to achieve by collaborating with each stakeholder? This purpose could range from gaining financial support, accessing specific expertise, getting regulatory approvals, or even garnering public support.
- **Regular Review:** The list of stakeholders and the purpose of collaboration should not be static. Project teams should regularly review this list, at least annually, to assess the progress of the collaboration efforts. This review helps in understanding what worked, what didn't, and what needs adjustment.
- **Assess Progress:** During the annual review, it's important to assess the progress made in each collaboration effort. Has the project achieved the desired outcomes through collaboration with each stakeholder? If not, what were the challenges faced, and how can they be addressed?
- **Revise Stakeholder Contacts and Levels of Engagement:** Over time, the key contacts within stakeholder organizations might change. It's essential to update this information to ensure effective communication. Additionally, the level of engagement with each stakeholder might need adjustment based on the project's evolving needs and the stakeholder's changing interests.
- **Evaluate Collaboration Objectives and Tactics:** Are the collaboration objectives still relevant? Have the tactics used for collaboration been effective? This evaluation helps in refining the collaboration strategy. If certain tactics are not producing the desired results, they might need to be replaced or modified.

The ultimate goal of collaboration is to support the implementation of the project. Therefore, during the review, it's crucial to assess whether the collaboration

efforts are indeed contributing to the project's successful implementation. If not, adjustments need to be made to align collaboration activities with project goals.

### 2.3.2. Learning

**E**ngaging in learning activities provides active and constructive opportunities to establish a solid foundation of evidence for adaptive learning programs. It is essential for each project to formulate a learning agenda, incorporating questions derived from project assessments, reflections from Theory of Change workshops, performance discussions, and other contextual information gathered during the implementation phase. After identifying these learning questions, projects should create a comprehensive learning roadmap. This roadmap guides the execution of the learning agenda by outlining the approach, which could involve formative assessments or operational research. The learning roadmap should address specific areas, such as determining the necessary information and methods for data collection, identifying key internal and external stakeholders for product dissemination, specifying the types of learning products (such as reports, briefs, abstracts, and publications), and planning the dissemination mechanisms, which may include learning events, webinars, publications, and videos. This structured approach ensures that projects are well-informed and can effectively share their insights and findings. Learning Activities will be conducted in the following ways:

**Pause-and-Reflect** sessions are to be scheduled regularly, ranging from weekly to annually, based on feasibility. These sessions involve internal coordination and information sharing, such as reviewing monitoring data, as well as external collaborations with District Officials, key stakeholders, and participants in the project area.

**Before Action Review (BAR)** is a pre-intervention reflection activity where teams define their goals and foresee challenges by drawing on past experiences. It fosters disciplined planning and discussion about timelines, designs, processes, expected outcomes, and potential challenges.

**Using monitoring and evaluation for Learning:** Utilize monitoring and evaluation for learning purposes. Regularly track progress in achieving indicators at various intervals: weekly, monthly, quarterly, bi-annually, and annually. This data informs decision-making, facilitates course adjustments, and identifies design flaws or quality concerns via annual surveys.

**Theory of Change review:** Projects must annually assess their Theory of Change (TOC) validity, incorporating new data and insights. Adjustments to interventions based on this review enhance project design. Monitoring data aids annual ToC evaluation.

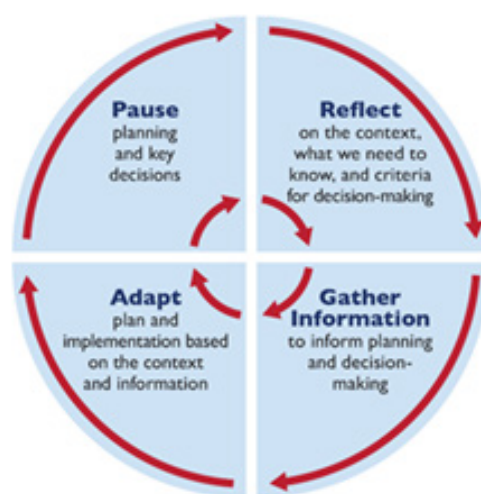


Figure 3: Illustration of a Learning Cycle



### 2.3.2.1. Research priorities

JMERC strongly believe in the role of data in informing our programming at the very grass root level in the communities we work with, our development path as well as for effective communication and advocacy with education and development partners. Therefore, this strategic plan has a research agenda with research priorities that are anchored onto the respective attributes to have learning questions. Details in the table below.

**Table 2: Showing the Research Priorities and their Learning Questions**

Research#	Learning Question	Sub- Questions
Research Priority One:	How can adolescent girls within low-resourced contexts be empowered and supported to develop agency and to learn, achieve and thrive?	What social and emotional learning competences do adolescent girls and young women require for their wellbeing? What supports do they need to develop these social and emotional competences?
		How best can we support sexual and reproductive health of adolescent girls and young women in ways that advance their human dignity?
		How best can we build, support and sustain a vibrant movement for girls’ education and empowerment in Uganda and the region
		How can schools and communities within low-resourced contexts effectively support adolescent girls and young women to learn, achieve and thrive?
Research Priority Two:	How can the youth in Uganda develop life-skills and values they require for life-long learning and the world of work?	How can we decolonize and contextualize the concept of SEL for better program adaptation and scale-up?
		What social and emotional learning competences do the secondary school youth require for their wellbeing? What supports do they need to develop these social and emotional competences?
		How best can schools nurture students’ skills and values for life-long learning?
Research Priority Three:	How can schools and communities support effective learning for all	How can teachers be supported to use learner-centered and gender responsive teaching, assessment tools and methodologies in ways that enhance effective learning for all and girls’ empowerment?
		How can parents/caregivers support children’s learning at home, and social-emotional wellbeing and collaborate schools?
		What innovative approaches can teachers use to enhance childrens’ Foundational Learning (FL) skills?

<b>Research Priority Four:</b>	How can we strengthen our capacity for resource mobilisation, sustainability, governance in order to effectively promote the right to quality education in Uganda?	How can we develop a human resource team with passion and audacity to implement the JMERC mission?
		How can we develop a funding model to sustain JMERC programmes?
		What management and governance structures do we need to put in place? How can we develop a learning and self-improvement culture?
<b>5 Research Priority Five:</b>	What evidence data do we need to show the effectiveness and efficiency of JMERC school-wide ecosystem model?	What do we need learn, do or develop in order to sustainably grow our program impact?
		What lessons can we draw from the JMERC ecosystem model? How can these lessons inform the Ministry of Education and Sports?
		What partnerships and networks do we need to scale the JMERC ecosystem model?

The research priorities, as learning questions, are envisioned from the assessments to be conducted and as per the theory of change actualisation workshop guiding the learning activities and needs that will take place throughout the implementation period. From the learning questions, a detailed learning roadmap will be developed for each to guide the execution of the learning agenda questions detailing the approach; either through formative assessments or operational research. The learning road map will cover the following areas;

- Data (What information is needed to answer this question/ How will you collect it and the source)
- Target audience - key stakeholders (internal and external) to be targeted for dissemination of the products
- Learning Product (reports, briefs, abstracts)
- Dissemination Mechanism (Learning event, webinar, publications)

Further refinement of the learning questions will be done during the development of the learning road map which follows six major steps as demonstrated below.

**Figure 4: Illustration of the Learning Road Map**



### 2.3.3. Adapting

Projects ought to implement Collaborating, Learning, and Adapting (CLA) principles for adaptive management, utilizing iterative learning to enhance design and strategy. Integrating collaborative learning results, programs should adapt. Sharing best practices is crucial, and documenting adaptations in a decision tracker ensures traceability over time, this is backed with evidence that is toiled through research basically; JMERC set out research priorities, which will give the basis the evidence generation.

**Adaptive Management Approaches:** The Adaptation Guidelines will provide details on how the JMERC understands adaptive management and how they intend to integrate this approach throughout the JMERC project. The adaptive management approach reflects the commitment that project staff at all levels will be actively engaged in ongoing learning and research, as well as the commitment to frequently hold and engage in stakeholder consultations and sharing of learnings and research outcomes externally.

JMERC will use adaptive management to encourage the **perpetual improvement of project design and strategy** over the course of implementation for learning and research in all areas required. The project will apply CLA principles as the basis of the adaptive management process and use iterative learning to inform and improve project design and strategy. This approach will support JMERC experience those optimal solutions (both technical and in terms of delivery) can often only be revealed during implementation of the project; development issues are highly contextual, conditions change, and interventions themselves can affect the system of operation. While traditional "best practices" offer insight to universal problems, the project appropriate and sustainable solutions will be customized to the specific environment and through learning from and with stakeholders through an iterative, responsive, and inclusive process that inherently strengthens the base of evidence for project development and global integration.

**Redesigning and Implementing:** The JMERC will use a modified version of the JMERC approach to adaptive management. Typically, leveraging on CLA principles by using the review of project plans through the content of the original proposal. Through this process and in coordination with donor, the project TOC, Log-frame, and overall strategic design of the project will be improved to better reflect local context, stakeholder perspectives, and input from key partners.

**Integrated Context Monitoring and Adaptive Scenario Planning Approach:** Context monitoring will be used to understand the areas in which the project is being implemented, environmental or policy changes, and changes learning dynamics. Context monitoring will help the project to track many of the assumptions in their TOC and how these external influences may affect project interventions. This will allow the project to understand the local systems and situations in the area of operation.

**Figure 5: Illustration of the Integrated Context Monitoring and Adaptive Scenario Planning Approach**

**Supportive Ecosystem, Policies, guidelines and frameworks remain enabling for learners:** We assume that across primary stakeholders - the Government of Uganda (GoU) (Ministry of Education and Sports (MoES), the district local governments, other ministries), there exists sufficient alignment of priorities and a shared urgent need to identify and model cost-effective and impactful entities are to give a conducive policies and guidelines which support and enable the programme activities during implementation. This can be measured through reviewing changes in the global, national and district education policies, guidelines and frameworks and ensuring they remain supportive/enabling to the communities we serve.

The project will use scenario planning to address challenges that hinge on specific, but uncertain, outcomes. As part of the context monitoring strategy, the JMERC team will engage in scenario planning when external forces either increase in likelihood of affecting project interventions or become a threat to targeted persons or staff.



**Examples** of scenarios that may affect program design and implementation may include:

Rumours spread of a learner not attending school in second term regularly, the team will on this case conduct scenario planning to understand the likelihood of none attending regularly, when it would occur if it was likely to occur, and plan on how to have this solved during trainings and engagements.

Project Technical teams will be supported by dedicated MERL personnel responsible for data collection, analysis, technical reporting, and applied learning. Some of these change points may be sudden, such as stopping research because of unexpected harmful outcomes or changes in context, whereas others may involve a more gradual or continuous change throughout the research. They can be done for reasons of design efficiency or revised interventions for increased effectiveness that better align with best practices or the national policy. Regardless of the type of adaptation, as information is collected, this will be used to learn from and make important decisions pertaining to the research. The Project Technical teams will continuously monitor interventions to enable timely achievement of the project goals or identification of issues impeding their success. In this context, the project will envision five distinct types of possible adaptation.

- Adaptations that may affect specific elements of the design of the Project
- Adaptations that calibrate an intervention or its delivery
- Adaptations that will be necessary to improve a future project.
- Adaptations that affect the design of the ongoing research designs and methods
- Adaptations that will be made in the next iteration of the research.

## 2.4. Period Three: End

**End line evaluation:** End line evaluation is a crucial phase in the evaluation process of a project. It serves as a comprehensive assessment of the project's overall performance, effectiveness, and impact at the conclusion of the project period. Unlike baseline and midterm

evaluations, which are conducted at the beginning and middle stages of the project respectively, the end line evaluation provides insights into the project's outcomes, achievements, challenges faced, and lessons learned. Here are some key aspects to be considered in the context of end line evaluation:

### **Assessing Project Goals and Objectives:**

JMERC will evaluate the extent to which the project has achieved its goals and objectives as outlined in the initial project strategic plan and determine whether the project outputs and outcomes align with the intended objectives.

**Impact Assessment:** Measure the long-term effects and impact of the project on the target population or community. Assess the positive and negative changes brought about by the project and their sustainability beyond the project period.

**Effectiveness of Implementation:** Evaluate the efficiency and effectiveness of the project's implementation strategies and methodologies. Identify the factors that contributed to the success or failure of the project's implementation process.

### **Stakeholder Engagement and Participation:**

Assess the level of engagement and participation of stakeholders, including beneficiaries, partners, and community members. Analyze the role of various stakeholders in the project and their contributions to the project's outcomes.

### **Sustainability and Scalability:**

Evaluate the project's sustainability by analyzing whether the project outcomes can be maintained after the project has ended. Explore the potential for replicating the project's success in similar contexts or scaling up the interventions to reach a larger audience.

**Cost-effectiveness and Efficiency:** Value for money, as a transparency mechanism, JMERC will Analyze the cost-effectiveness of the project by comparing the resources invested with the achieved outcomes. Identify areas where the project could have been more efficient in resource utilization.

**Lessons Learned:** JMERC will ensure documentation of all key lessons learned during the project implementation, including challenges faced and successful strategies employed. Provide recommendations for future projects based on these lessons to improve project planning and implementation strategies.

**Reporting and Dissemination:** JMERC will Prepare a comprehensive end line evaluation report highlighting the findings, conclusions, and recommendations. Disseminate the evaluation results to stakeholders, funding agencies, and the wider community to share insights and knowledge gained from the project. It serves several important purposes, like

- **Knowledge Sharing:** Sharing successful strategies, best practices, and lessons learned contributes to knowledge sharing within the organization and the broader community. It helps others benefit from the project's experiences.
- **Inspiration and Engagement:** Communicating positive outcomes

can inspire stakeholders, motivate project teams, and engage potential collaborators for future initiatives.

- **Transparency and Accountability:** Disseminating results demonstrates transparency and accountability to project sponsors, donors, partners, and beneficiaries. It showcases the project's impact and how resources were utilized.
- **Building Legacy:** By disseminating results, the project leaves a lasting legacy that contributes to ongoing conversations, research, and decision-making in relevant fields
- **External vs. Internal Evaluation:** As deemed fit, JMERC will consider the advantages of conducting the end line evaluation through an external entity for objectivity and unbiased assessment. If conducted internally, ensure transparency, impartiality, and adherence to evaluation standards to maintain credibility.

End line evaluations are essential for project accountability, learning, and improvement. By systematically assessing the project's design, implementation, and outcomes, organizations can enhance their future projects, contribute to the body of knowledge in their field, and ultimately make a positive impact on the communities they serve.

## 2.4.1. Project Closure

Project closure is the conclusive phase of a project's life cycle, signifying the structured conclusion of all project-related activities. During this stage, meticulous attention is given to various aspects to ensure a seamless transition and meaningful reflection on the project's outcomes.

Financial and administrative closure stands as a primary focus, involving the meticulous finalization of financial transactions and contracts, complying meticulously with both organizational and legal mandates. Simultaneously, document archiving plays a pivotal role, preserving essential project documents, reports, and data. These are archived for future reference and audit purposes, fostering accountability and transparency. The stored information, residing both in the JMERC Management Information System and the finance and operations office, serves as a repository of project knowledge.

Knowledge transfer emerges as a vital component, enabling the dissemination

of project insights and responsibilities to relevant individuals or teams within the organization. This ensures the seamless continuity of acquired knowledge and sustains the project's impact even after closure. Furthermore, organizing a formal closure event, encompassing both internal stakeholders and external partners, becomes instrumental. This event serves as a platform to celebrate achievements, recognize contributions, and contemplate the project's transformative journey.

Crucially, feedback from stakeholders is solicited during the closure process. Their experiences and insights are invaluable, providing essential input for refining future project designs and approaches. Moreover, this feedback informs the completion of the final project report, encapsulating the project's challenges, successes, and the lessons learned. In essence, project closure embodies meticulous financial closure, knowledge preservation, seamless knowledge transfer, celebratory acknowledgment, stakeholder feedback integration, and insightful documentation.



## 2.5. Resourcing for Monitoring, Evaluation, Research and Learning

In project management, Monitoring, Evaluation, Research, and Learning (MERL) activities are fundamental to assess a project's progress, effectiveness, and impact. Recognizing their critical role, it is imperative to allocate sufficient resources for MERL staffing and activities right from the project's design and refinement phase.

During the design and refinement phase, careful consideration must be given to various MERL activities. Baseline studies, conducted at the project's outset, provide essential benchmarks for measuring future progress. Ongoing monitoring activities ensure real-time tracking of project activities and outcomes, enabling timely adjustments if deviations occur. Midterm reviews offer a comprehensive assessment of the project's status, allowing for strategic adjustments if necessary. End-of-project evaluations provide a holistic view of the project's achievements and areas for improvement. Documentation processes capture valuable project data and experiences, facilitating knowledge sharing and future planning. Feedback sessions engage stakeholders, incorporating their perspectives into project adaptations. Additionally, capacity-building activities enhance the skills and knowledge of project staff, ensuring effective implementation.

To guarantee the smooth execution of these activities, a dedicated budget

line for MERL should be established within each project. This budget should cover the costs associated with hiring skilled professionals for MERL roles, such as researchers, evaluators, and data analysts. Furthermore, it should encompass expenses related to conducting baseline studies, continuous monitoring, midterm reviews, end-of-project evaluations, documentation processes, feedback sessions, and capacity-building initiatives.

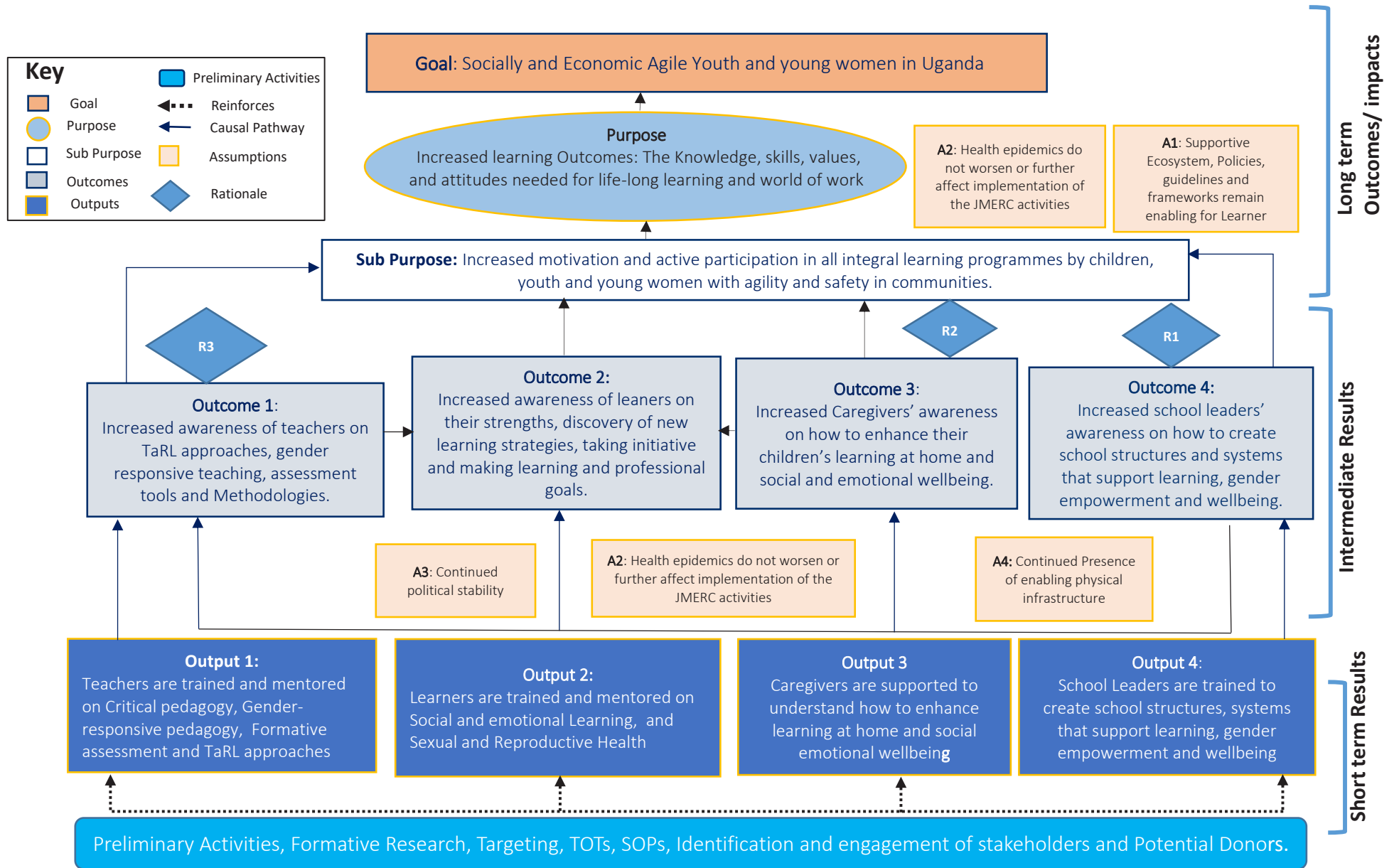
A vital component of the MERL budget line is the allocation for human resource support, ensuring that qualified personnel are available to carry out these tasks effectively. The allocation should be strategic, considering the complexity and scope of the project.

To provide a clear financial framework, it is recommended that the MERL budget accounts for 5% to 10% of the total project budget. This percentage ensures an adequate allocation of resources without significantly burdening the overall project finances. Properly budgeted MERL activities not only enhance project accountability but also foster a culture of continuous learning and improvement, ultimately leading to more successful and impactful projects.



3. Annexes

Annex 1: Jmerc Theory of Change Illustration



## Annex 2: Monitoring, Evaluation, Research and Learning Logical Framework

Narrative Summary	Indicators	Data Source	Assumptions	Frequency
Goal: Socially and Economic Agile Youth and young women in Uganda.	1.1: Proportion of Youth and Young Women who are Socially and Economically agile and Empowered.	Endline Evaluation Reports and Impact Evaluation Reports		Frequency of Reporting: Reports come in various types, differing in frequency (weekly, monthly, quarterly, semi-annual, and annual) and formats (detailed written documents and visual presentations). The project team is expected to generate different categories of reports as needed, such as technical reports, M&E Reports, progress reports, study/assessment reports and management/administrative reports.
Purpose: Increased learning Outcomes such as Knowledge, skills, values, and attitudes needed for life-long learning and world of work.	1.1: Proportion of Learners showing improvement in their knowledge, skills, values and attitudes needed for lifelong learning and the working world.	Endline and Midline Evaluation Reports	A1: Supportive Ecosystem, Policies, guidelines and frameworks remain enabling for Learner  A2: Health epidemics do not worsen or further affect implementation of the JMERC activities	
Sub Purpose: Increased motivation and active participation in all integral learning programmes by children, youth and young women with agility and safety in communities.	1.1: Proportion of children, youth (girls, young women and boys) with intrinsic motivation and actively participating in all learning programmes with agility.	Midline and Baseline Evaluation Reports		
Outcome 1: Increased awareness of teachers on gender responsive teaching, assessment tools and Methodologies.	1.1: Proportion of teachers using gender responsive teaching, assessment tools and methodologies.	Training Evaluation Forms, Jmerc Database and MERL Reports.		
Output 1: Teachers are trained and mentored on Gender responsive teaching assessment tools and Methodologies.	1.1: Number of teachers trained and mentored on Gender responsive teaching assessment tools and Methodologies.	Training attendance Forms/Lists and Jmerc Database.		
Outcome 2: Increased awareness of Learners on their Social-emotional skills and Sexual Reproductive Health.	2.1: Proportion of youth (girls and boys) who demonstrate social emotional skills while managing emotions and have an understanding of external influences e.g., culture, family and school.	Monitoring, Evaluation, Research and Learning (MERL) Reports and Jmerc Database	A2: Health epidemics do not worsen or further affect implementation of the JMERC activities.	
	2.2: Proportion of youth (Girls, Young women and boys) who demonstrate the ability to engage in respectful healthy relationships and know at least one source of information/service for Sexual Reproductive Health.		A3: Continued political stability	

Narrative Summary	Indicators	Data Source	Assumptions
Output 2: Learners are trained and mentored on Social-emotional Learning and Sexual Reproductive Health.	2.1: Number of youth (girls and boys) trained on Social and Emotional Learning. 2.2: Number of youth (girls, young women and boys) trained on Sexual Reproductive Health.	Training attendance lists, Post and Pre training evaluation forms.	
Outcome 3: Increased Caregivers' awareness on how to enhance their children's social-emotional wellbeing and learning at home.	3.1: Proportion of parents/caregivers providing social and emotional support to their children. 3.2: Proportion of parents/caregivers supporting their children's learning at home.	Midline Evaluation Reports, Jmerc Database and MERL Reports.	A2: Health epidemics do not worsen or further affect implementation of the JMERC activities. A4: Continued Presence of enabling physical infrastructure
Output 3: Caregivers are trained on how to enhance their children's social-emotional wellbeing and learning at home.	3.1: Number of parents/caregivers trained on how to provide social and emotional support to their children. 3.2: Number of parents/caregivers trained on how to enable learning for their children at home.	Training attendance lists, Post and Pre training evaluation forms.	
Outcome 4: Increased school leaders' awareness on how to create school structures and systems that support learning, gender empowerment and wellbeing.	4.1: Proportion of school leaders putting in place structures and systems supporting learning, gender empowerment and wellbeing.	MERL Reports. Midline and Endline Evaluation Reports.	A4: Continued Presence of enabling physical infrastructure
Output 5: School Leaders are trained to create school structures and systems that support learning, gender empowerment and wellbeing.	5.1: Number of school leaders trained on creating school structures and systems that support learning, gender empowerment and wellbeing.	School Leadership training attendance lists and Pre & Post training evaluation forms.	

## Annex 3: Research Priorities Matrix

Research#	Learning Question	Sub- Questions	Data sources	Stakeholders (Internal and external)	Learning Product	Dissemination Mechanism
Priority One: Girls' Education and Empowerment	How can adolescent girls within low-resourced contexts be empowered and supported to develop agency and to learn, achieve and thrive?	What social and emotional learning competencies do adolescent girls and young women require for their wellbeing? What support do they need to develop these social and emotional competencies?	Contextualization Studies, Literature Reviews, School Attendance Rotter and Interviews with Students.	Teachers, Learners (Mainly Girls) and Parents.	Reports, Video clips, Abstracts	Learning Summits, Short Videos and Publications.
		How best can we support the sexual and reproductive health of adolescent girls and young women in ways that advance their human dignity?				
		How can schools and communities within low-resourced contexts effectively support adolescent girls and young women to learn, achieve and thrive?				
		How best can we build, support and sustain a vibrant movement for girls' education and empowerment in Uganda and the region?				
Priority Two: Life-skills and Values for Youth	How can the youth in Uganda develop life-skills and values they require for life-long learning and the world of work?	How can we decolonize and contextualize the concept of SEL for better adaptation and scale-up in Uganda and the region?	Contextualization Studies, Literature Reviews, School Attendance Rotter and Interviews with Students.	Learners (Girls/ Youth), School Stakeholders (Administrators, Teaching and Non-Teaching Staff), Employers, Parents/ Community and Support Partners.	Partner Convenings, Findings from Studies.	Project Reports
		What social and emotional learning competencies do the secondary school youth require for their well-being? What support do they need to develop these social and emotional competencies?				
		How best can schools nurture students' skills and values for life-long learning?				

Priority Three: School and Community Engagement	How can schools and communities support effective learning for all and girls' empowerment?	How can teachers be supported to use learner-centered and gender- responsive teaching, assessment tools and methodologies in ways that enhance effective learning for all?	Teacher Training Institutes, NCDC Education Experts, Focus Group Discussions with both Teachers and Parents.	School Stakeholders (Administrators, Teaching and Non- Teaching Staff), Employers and Parents/Community.	End of Project Workshops, Success Stories.	Publications
		What innovative approaches can teachers use to enhance children's Foundational Learning (FL) skills?				
		What are the alternative approaches to engage and empower parents to support students learning?				
		How can parents/caregivers support children's learning at home, and social- emotional wellbeing and collaborate schools?				
Priority Four: Institutional internal development	How can we strengthen our capacity for resource mobilization, sustainability, governance in order to effectively promote the right to quality education in Uganda?	How can we develop a human resource team with passion and audacity to implement the JMERC mission?	Staff Appraisal Assessment, Consulting from International Organizations and End of Year Programme Evaluations.	Funders/ Donors, Partner Organizations, Educational Consortiums and Government/Legal Organizations.	Reports, Advocacy Initiatives and Attending Exhibitions.	Policy Briefs, Flyers and Brochures.
		How can we develop a funding model to sustain JMERC programmes?				
		What management and governance structures do we need to put in place? How can we develop a learning and self- improvement culture?				
Priority Five: Institutional capacity to scale	What evidence data do we need to show the effectiveness and efficiency of JMERC school- wide ecosystem model?	What do we need learn, do or develop in order to sustainably grow our program impact?	Annual Achievements Attained, MERL Reports and Project Performance Reports.	All JMERC Staff and Departments.	MERL Reports and Performance Appraisals.	Staff Presentations.
		What lessons can we draw from the JMERC ecosystem model? How can these lessons inform the Ministry of Education and Sports?				
		What partnerships and networks do we need to scale the JMERC ecosystem model?				



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