



MEL Training Materials

the **bizzell** group

NORC at the University of Chicago



DATAELEVATES



Module 2

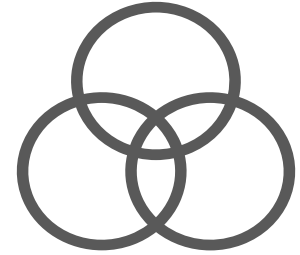
Complexity-aware MEL for ILAB labor rights projects

March 2023



BUREAU OF INTERNATIONAL LABOR AFFAIRS

Module 2 Overview



1. SECTION 1: CAMEL Essentials

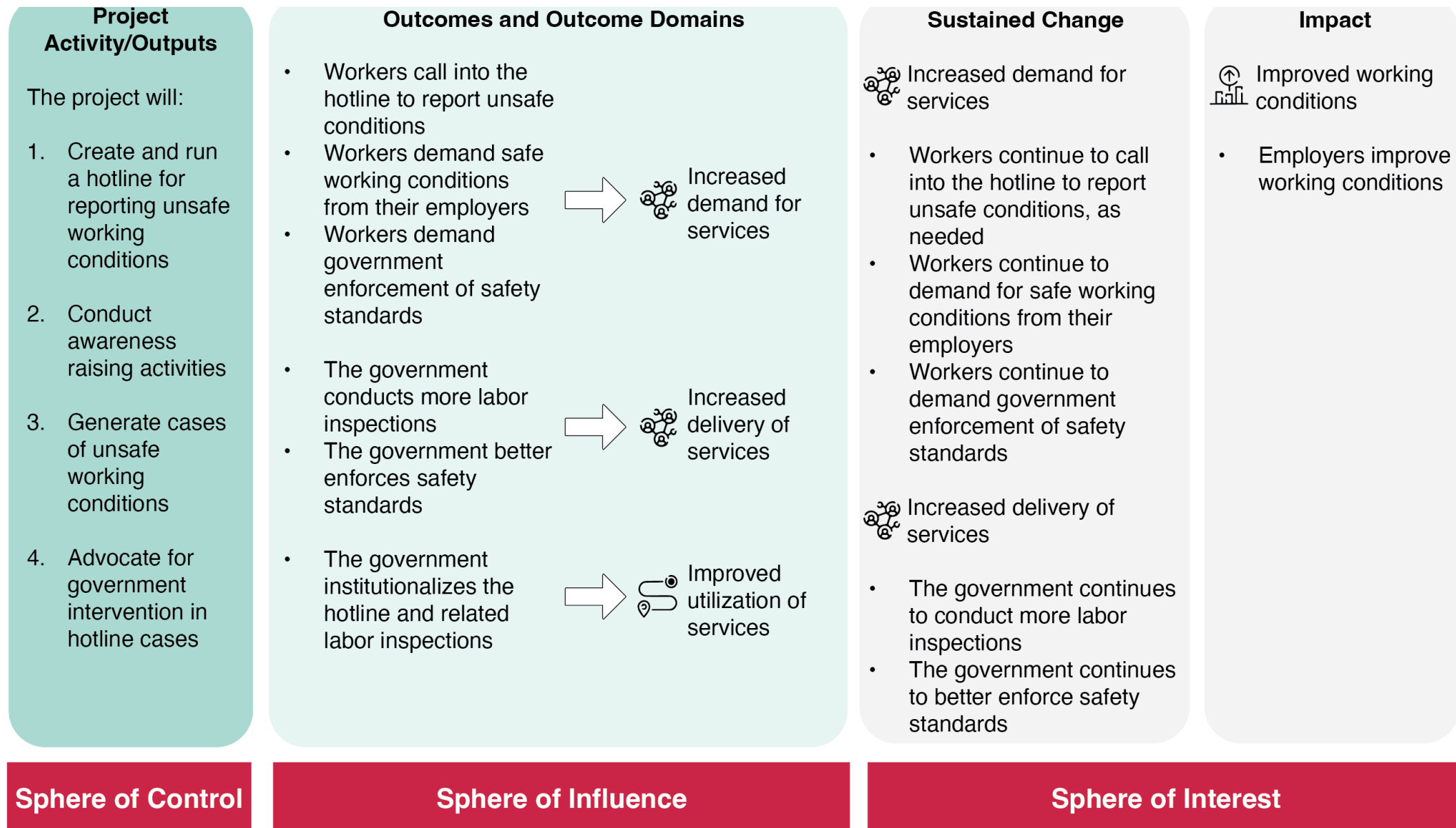
- a. Why is complexity-aware monitoring, evaluation and learning (CAMEL) useful?
 - b. What is CAMEL?
 - c. What does CAMEL look like in practice, especially for ILAB projects?
 - d. How do outcome monitoring and CAMEL work together?
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2. SECTION 2: Complexity-aware principles at work in ILAB in project MEL systems

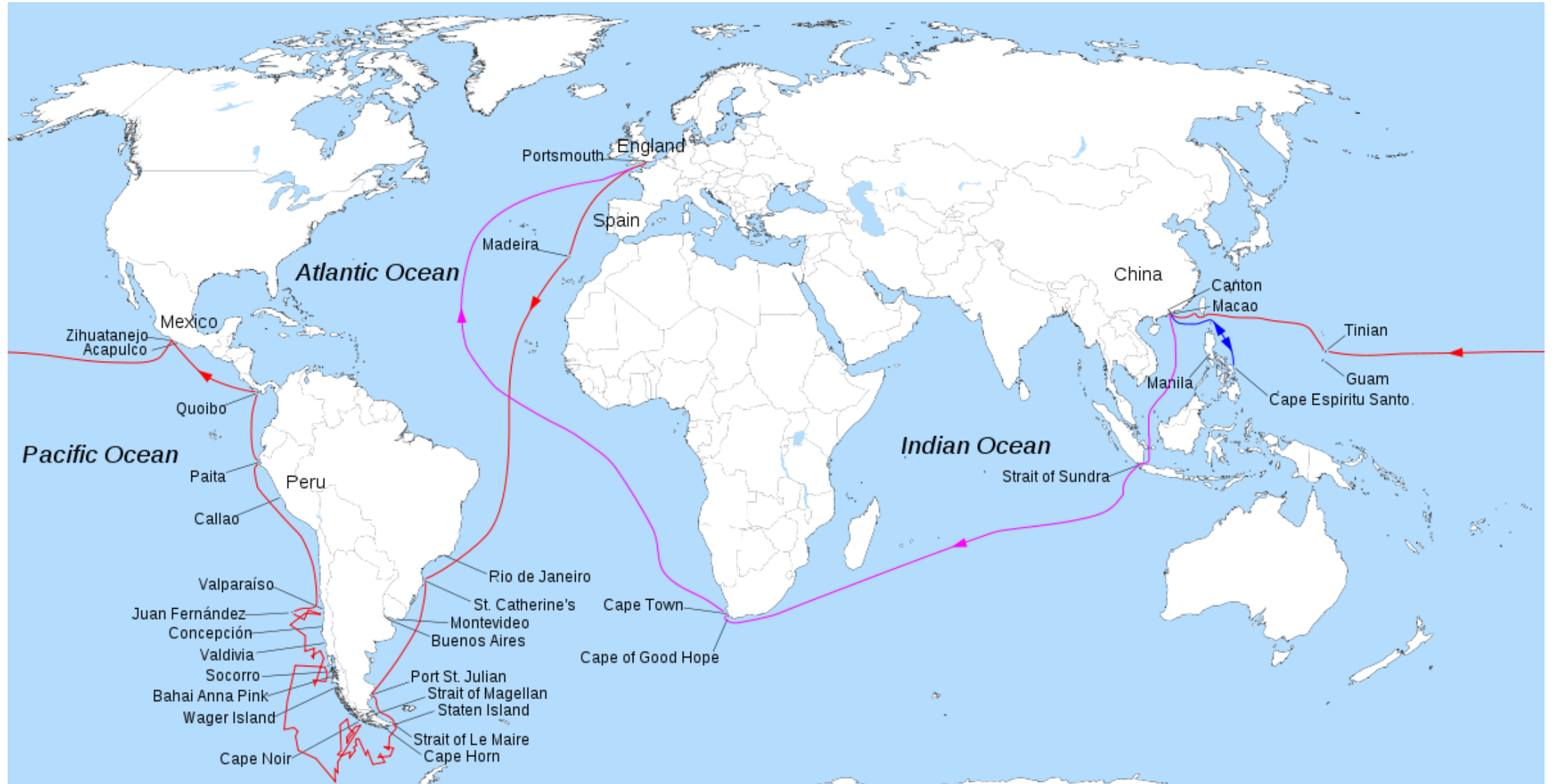
3. SECTION 3: Exercises

Key Terms

- **CAMEL:** Complexity-aware monitoring, evaluation and learning
- **Projects:** programming
 - Activities funded by ILAB
- **Project logic model:** theory of change



We need a plan ...



...and we need to track changes in the context



Challenges when monitoring context



Complexity-aware MEL helps to steer projects adaptively



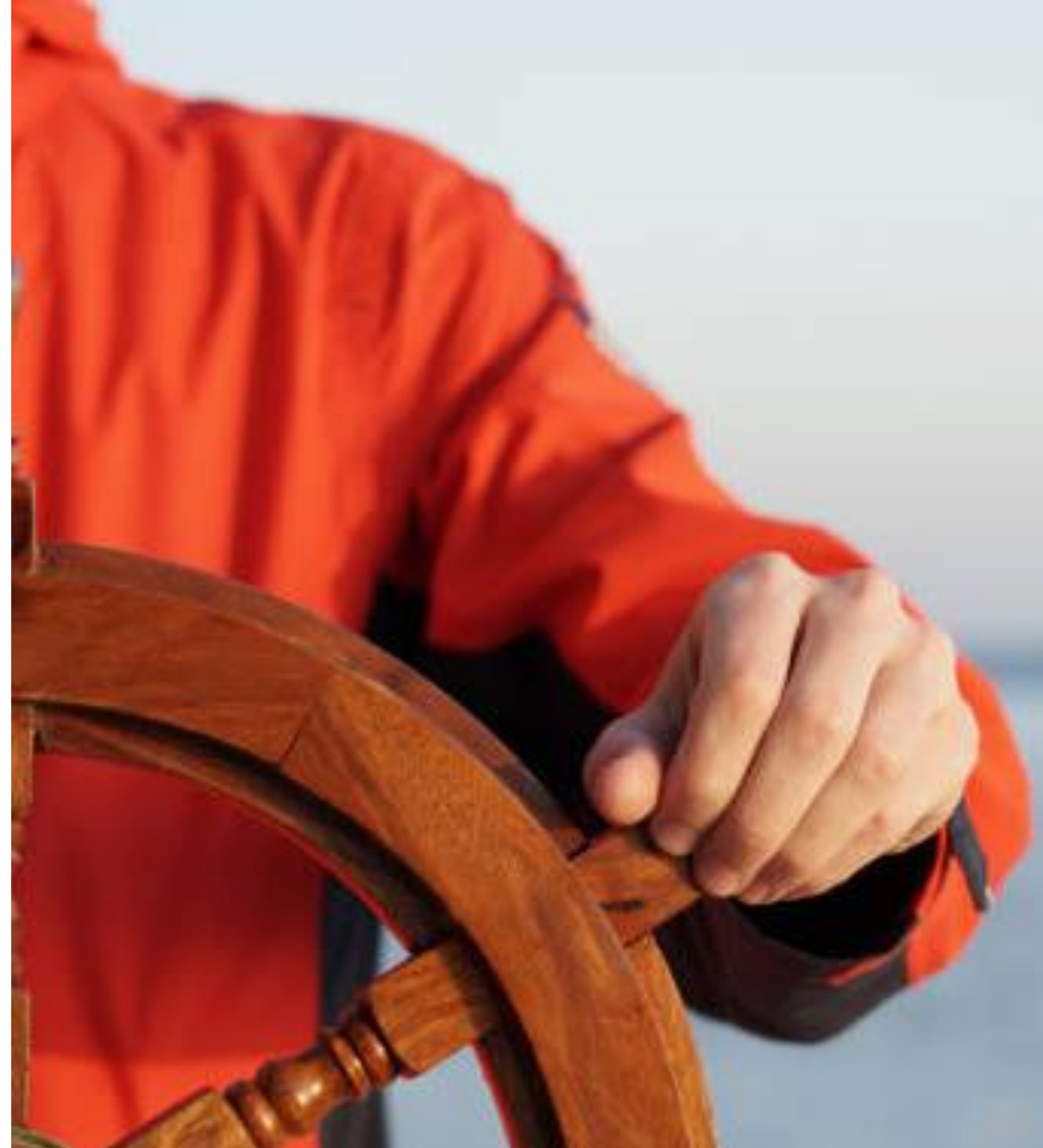
What is complexity?

- **Uncertain and unpredictable** cause and effect relationships
- Project is subject to influence by **contextual factors**
- Project is likely to contribute to **emergent** (unpredictable) outcomes
- Stakeholders bring **diverse perspectives**; goals and strategies are contested; consensus is impractical
- Pace of change is **dynamic**; changes in the context lead to new opportunities and/or needs
- Adaptive management is necessary to steer effectively

Navigating the Context

Complexity-aware MEL prioritizes information useful for steering in complexity

- Where and how the project is vulnerable to influence
- When decision makers need information



What is complexity-aware MEL?



principles
questions
methods
plans

What is complexity-aware MEL?

CAMEL is not characterized by specific data collection or evaluation methods.



What is complexity-aware MEL?



principles
questions
methods
plans

Complexity-aware MEL principles



1. Attend to the blind spots of program theory-based monitoring and evaluation
2. Monitor systemically (interrelationships, perspectives and boundaries)
3. Synchronize MEL with the pace of change

Complexity-aware MEL in practice

- Start with the principles
- Adapt to the project and context
- Design questions, select methods and build systems
- Focus on actionable information for decision-makers
- Tailored to your situation!

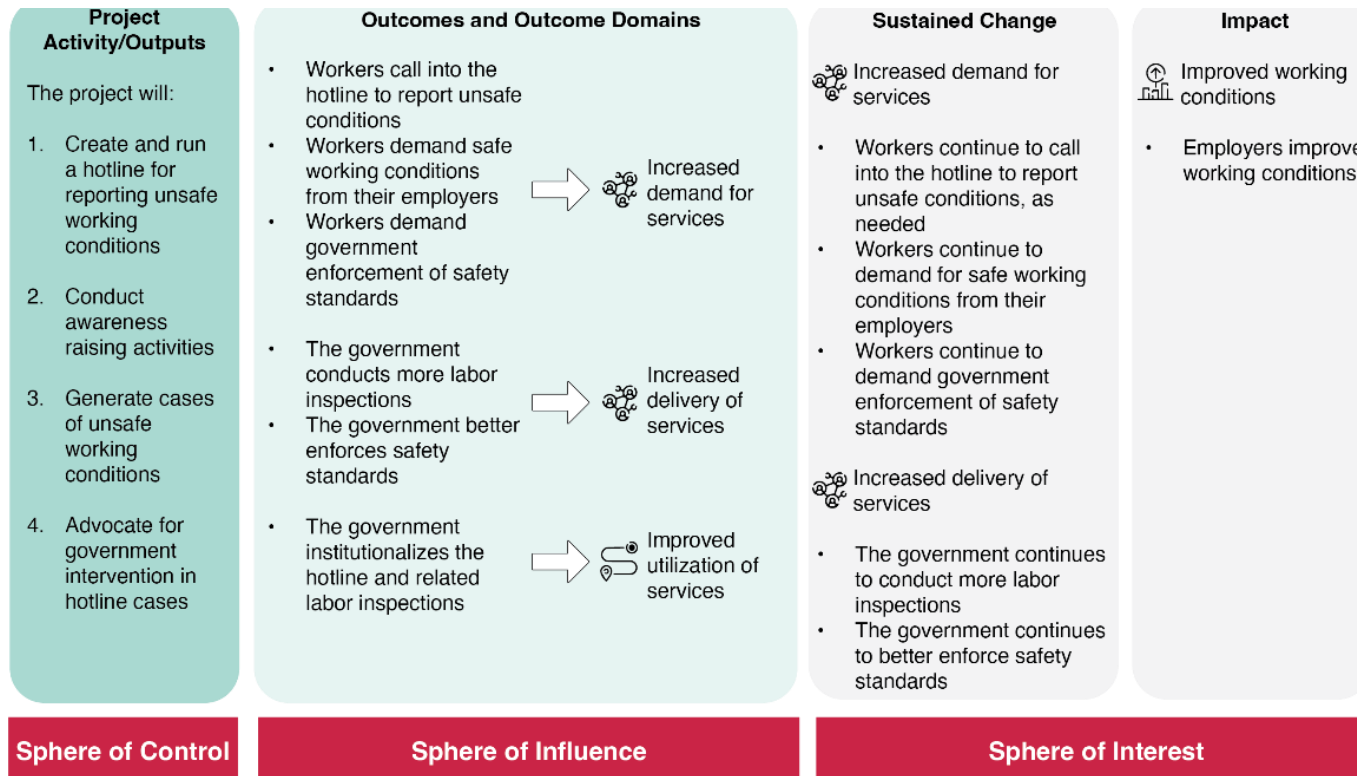


ILAB uses both theory-based and complexity-aware approaches to tell the project story

Program Theory-based MEL (TOsC and logic model)	Complexity-aware MEL (unpredictable and outside project influence)
Predicted aspects of projects	Unpredictable aspects of projects
Results intended by donor/planner	Results beyond those originally intended by donor/planner
Planned pathways of change	Uncertain, contested, emergent, and dynamic aspects
Targets and indicators	No targets; often indicator-free Evolving interrelationships between project and host system

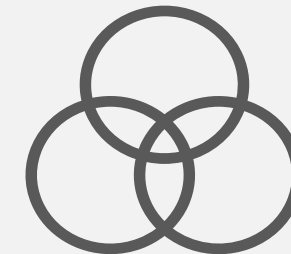
Outcome Monitoring and CAMEL work together

Our best prediction



What we cannot predict

Uncertain, emergent, contested, and/or dynamic aspects of the project and its context



Theory-based and complexity-aware approaches meet different information needs

Theory-based Outcome Monitoring

Are we making progress towards our intended outcomes?

Is progress faster or slower than expected?

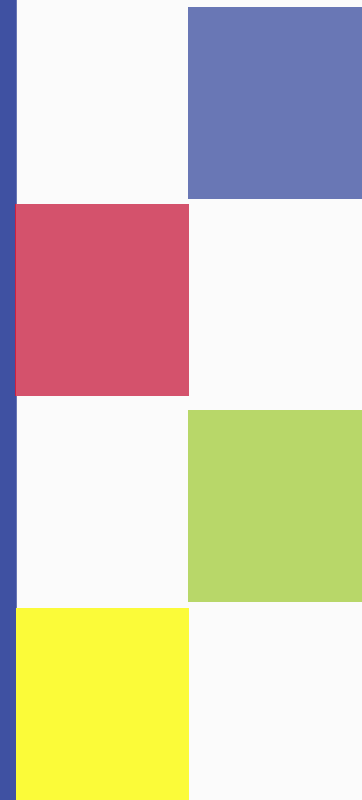
Complexity-aware Monitoring

- What **contextual factors** are likely to influence achievement of desired outcomes, either positively or negatively?
- How do others **perceive and value** the situation and the project? How will that influence their interactions with the project?
- What **emergent** (unpredicted) outcomes is the project contributing to?
- What is the **pace of change**? What new opportunities or constraints may arise in response to changes in the context?

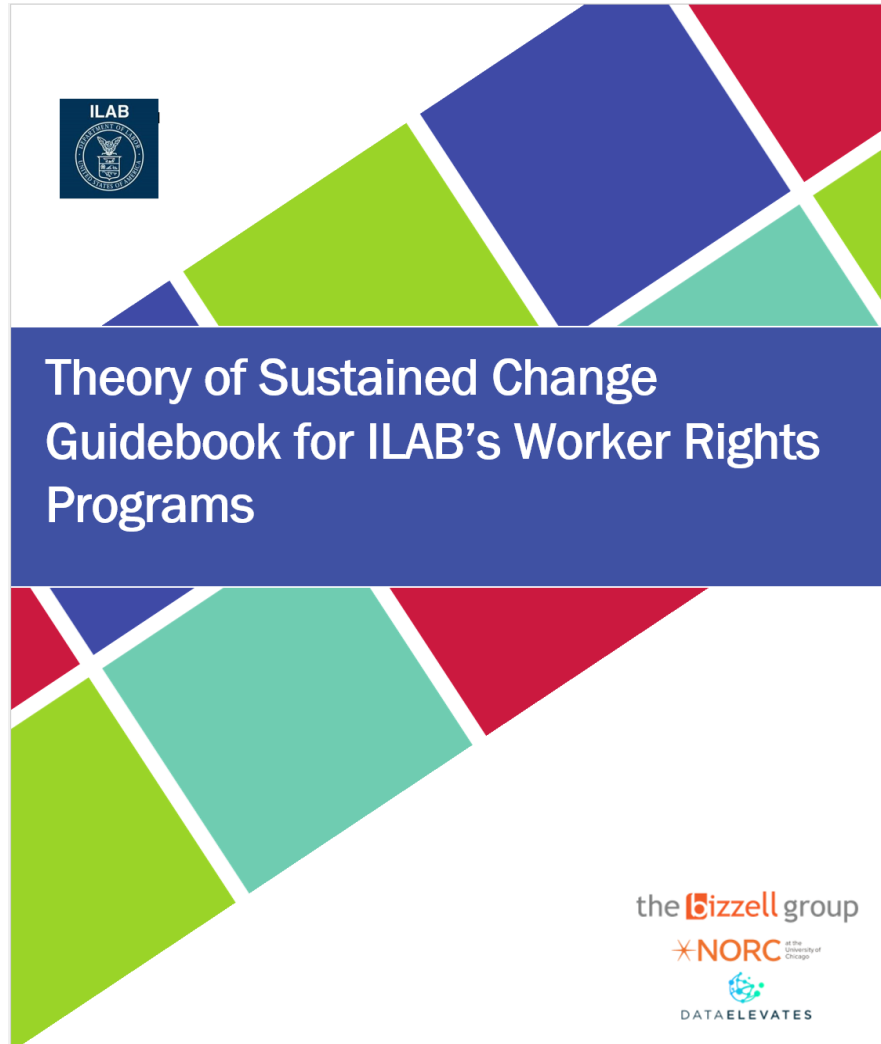


Complexity-aware principles at work in ILAB project MEL systems

Module 2: Section 2



Aligning the project logic model to ILAB's TOsC

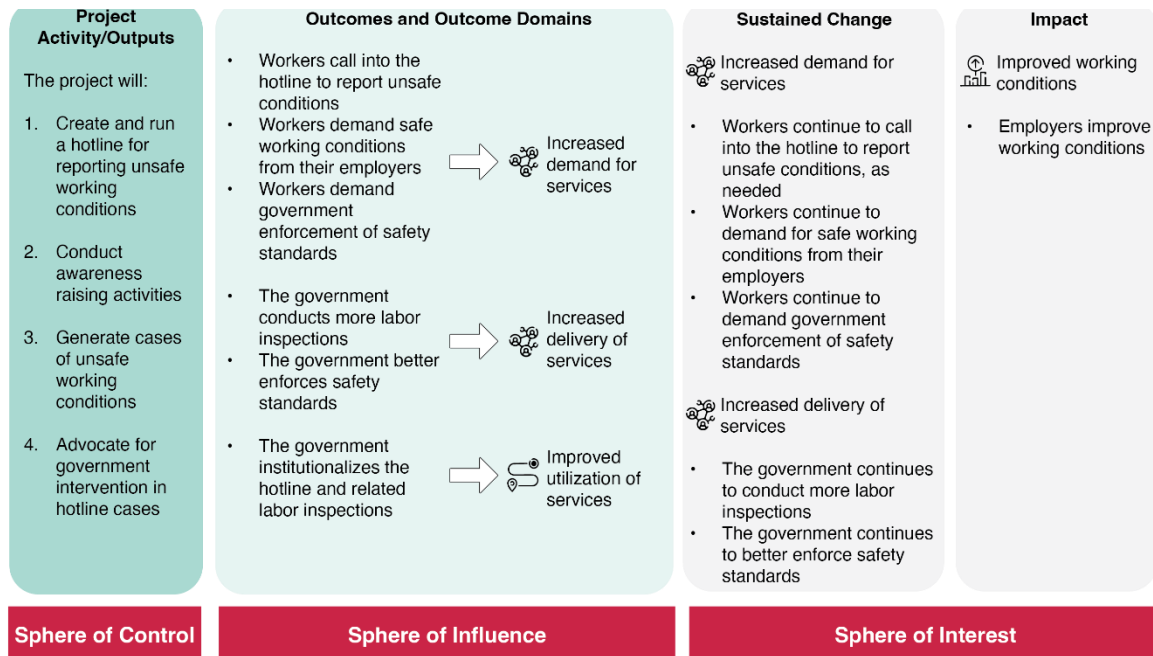


CAMEL Practice: Enhance the project logic model to identify where the project is sensitive to complexity

CAMEL Principle: Attend to the Blind Spots of Performance Monitoring and Program Theory-based Evaluation

Aligning the project logic model to ILAB's TosC

Include complexity in the logic model

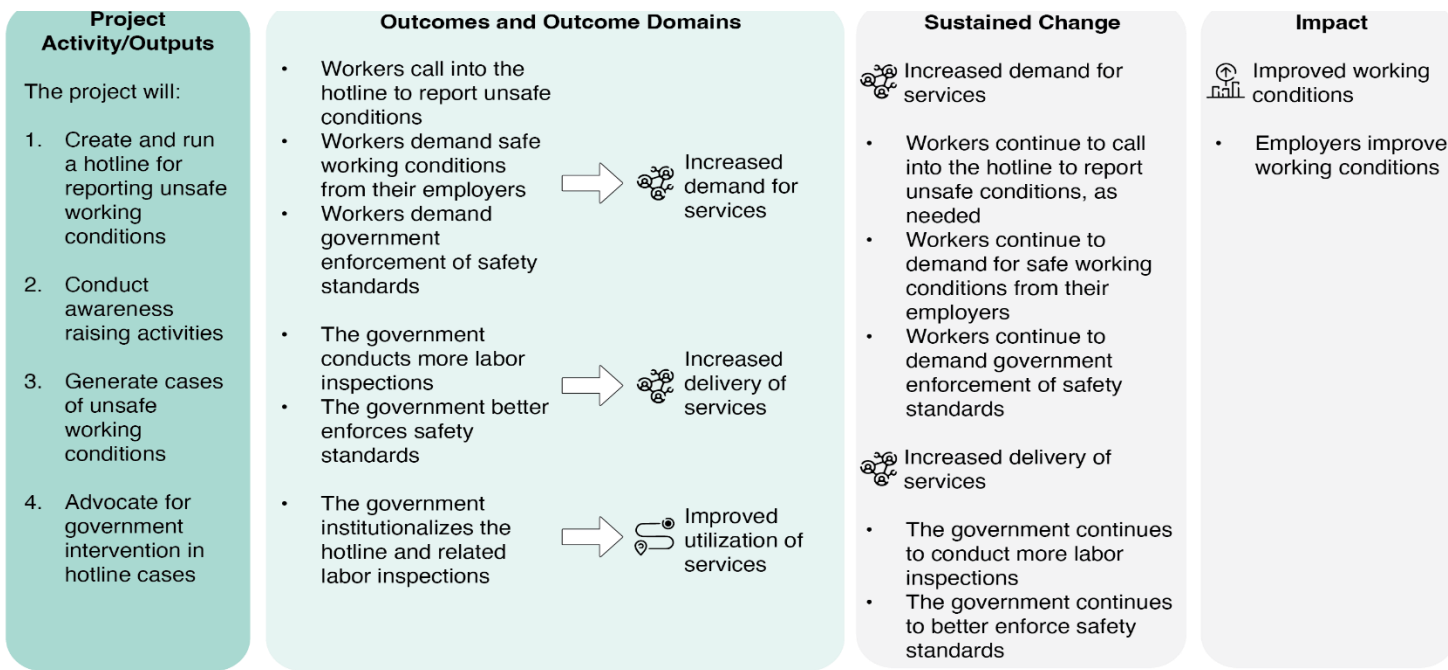


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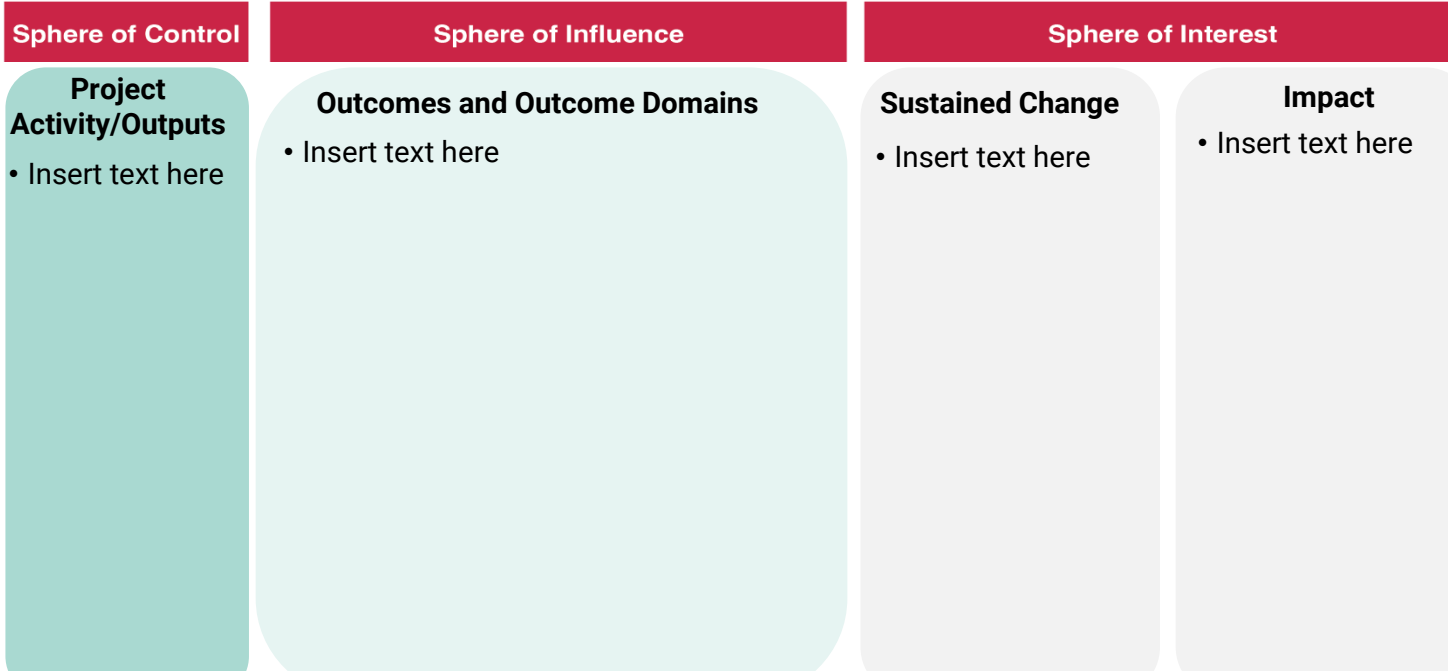
Participation is key to logic model development



SFWI Logic Model



Complex Aspects



CONTEXTUAL FACTORS



Actors and factors that are part
of the context



May influence a project



The project has
not been designed
to influence them.

Not an intended
result of the theory
of change

Often included as
"Contextual
Assumptions and
Risks"

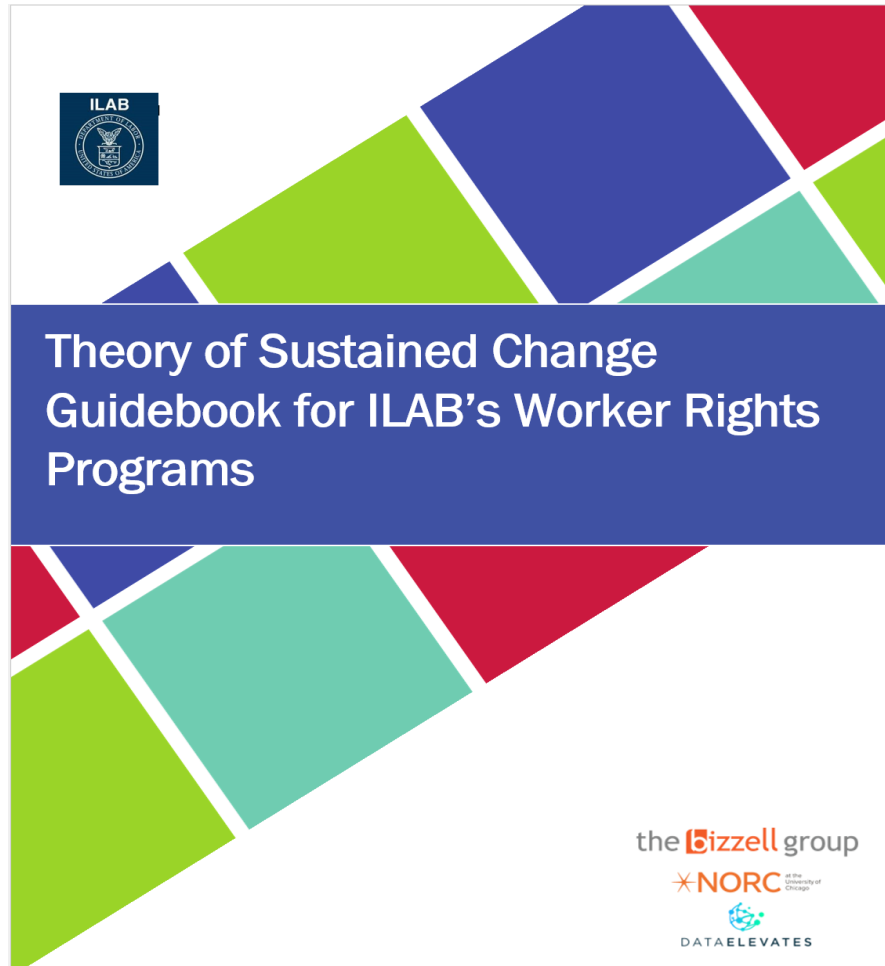
Diverse perspectives

Whose perspective does the project logic model represent?

- A single project will be “seen” and experienced differently by those with different relationships to it:
 - Intended beneficiaries and allies
 - Opponents
 - Those excluded
 - Affected/influential bystanders
- The success of a project relies on the participation of people operating with diverse perspectives.



Selecting and defining standard outcome indicators and defining targets

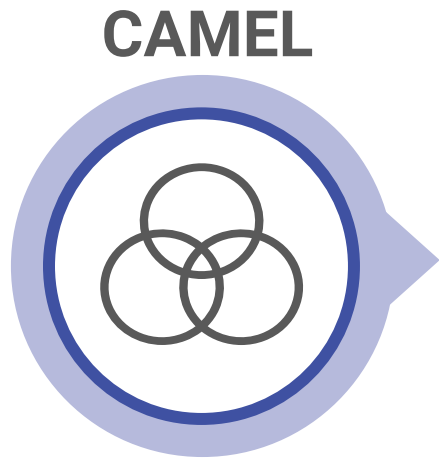


CAMEL Practice: Include CAMEL in your MEL system

CAMEL Principles:

- Monitor Systemically (Interrelationships, Perspectives and Boundaries)
- Synchronize M&E with the Pace of Change

How is CAMEL different from outcome monitoring?



- ✓ **No targets (may use trigger points)**
- ✓ **Often indicator-free**
Tip! Draft learning questions for complex aspects of the project and context
- ✓ **Prioritize usefulness in quality criteria**
What information is needed to inform adaptive management?
- ✓ **Methods: both classic and systems-informed methods can provide useful information**
- ✓ **Agile MEL is ready to speed up or slow down as needed**
When is information needed?

Key Take-aways

1

The benefit of CAMEL - informs adaptive management

2

CAMEL is a paradigm shift

3

Tailor CAMEL practice to your project and context

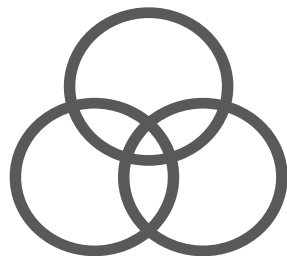
4

Enhance your project logic model with complexity

5

Right information at the right time - design the MEL system to provide actionable information for decision makers

Resources



ILAB's Guidebook: Look for this icon for suggestions for where to include CAMEL alongside the standard outcome indicators.



ILAB's MEL Resource Library: Additional resources on outcome monitoring and CAMEL.

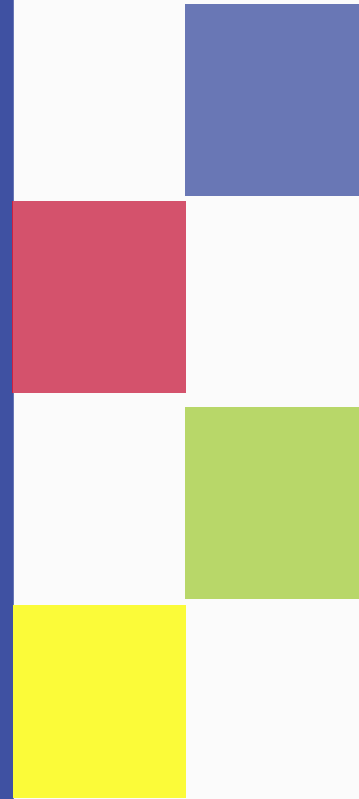
BREAK

Feel free to turn your camera off and go on mute. Please return in 7 minutes. When we return, we will begin an exercise.



Exercise: Enhancing project logic models by including complexity

Module 2: Section 3



Exercise directions in plenary

- Using the SFWI logic model, identify where and how the project is sensitive to complexity.
- Small group discussions explore either:
 - Contextual factors, or
 - Diverse perspectives

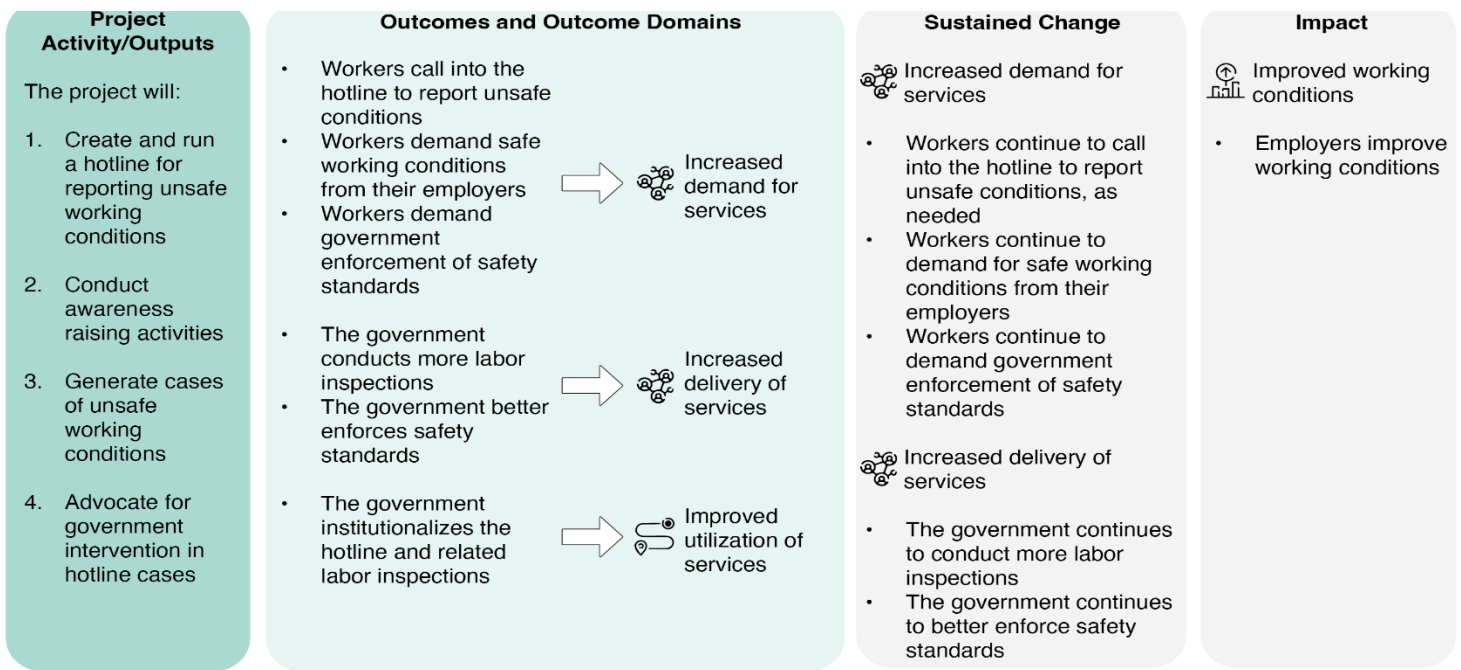
Directions: Contextual Factors

- Review: What is a contextual factor? What is not a contextual factor?
- Identify the contextual factors in the list.
- How do contextual factors influence the project? (pick at least one for discussion)
 - What point in the SFWI logic model is most likely to be influenced?
 - How might it influence the project's activities and outcomes?
- Prepare for share-back

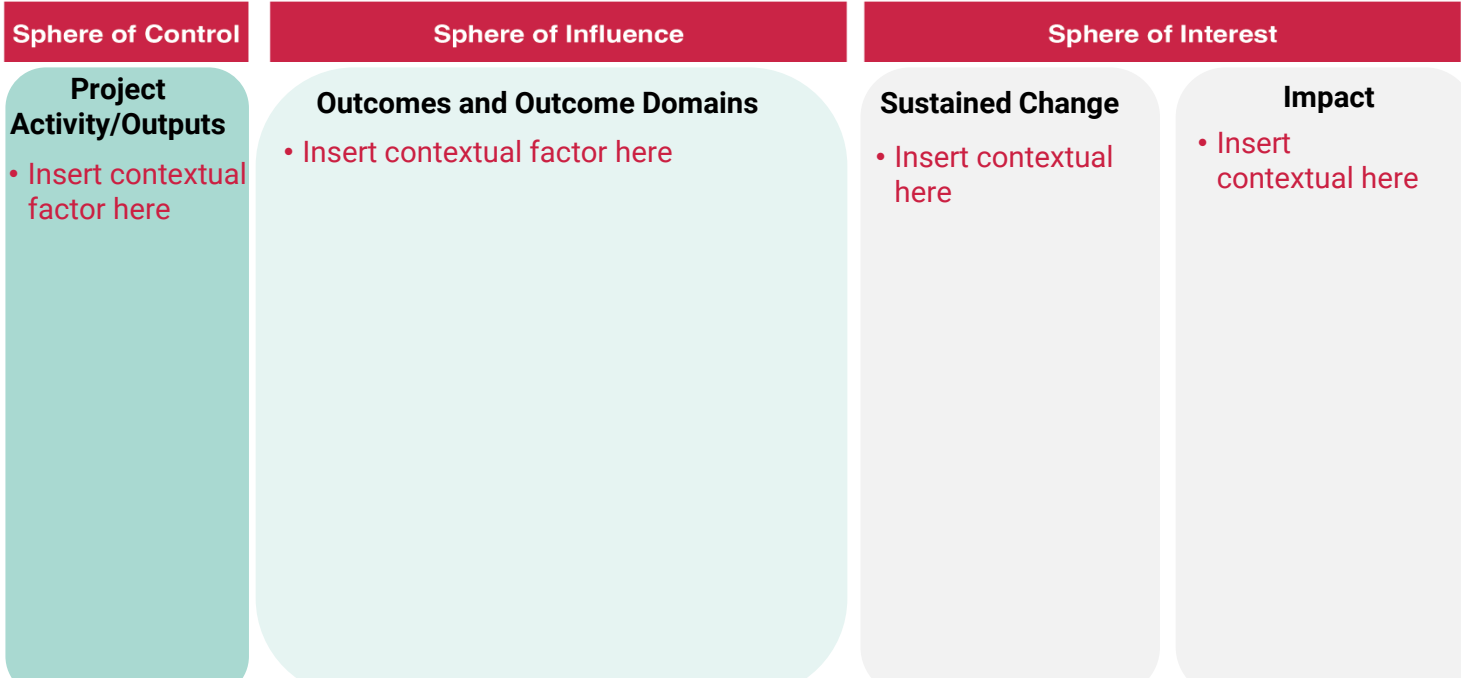
Possible SFWI Contextual Factors

1. The government conducts more labor inspections
2. Cell service interruptions limit workers' ability to call hotline
3. Police better enforce laws in agricultural communities
4. Advocates of other budget priorities pressure government decision-makers to prioritize their causes over workers' rights
5. SFWI meets with workers' groups to raise awareness of the hotline and workers' rights
6. Another community organization begins advocating for reduced gender and ethnic discrimination in the agriculture industry
7. SFWI's ability to meet with workers or labor inspectors limited by COVID-19 or natural disaster
8. Demand for agriculture products increases globally as communities recover from COVID-19

SFWI Logic Model



Complex Aspects



Directions: Diverse Perspectives

- Review: What is a perspective? Why is it important to consider diverse perspectives?
- Pick a perspective.
 - How does the project look from this perspective?
 - Where, when and how is the SFWI logic model most likely to be influenced by this perspective?
- Prepare for share-back

SFWI Project Stakeholder Perspectives

Select a stakeholder this is likely to have a different perspective from the donor and the implementer:

1. Agriculture workers
2. Government (specifically labor inspectors/Ministry of Labor)
3. Agriculture employers
4. Consumers of agricultural products (concerned about prices)
5. Local religious leaders
6. Other community organizations addressing workers' rights
7. Law enforcement officers
8. Healthcare providers

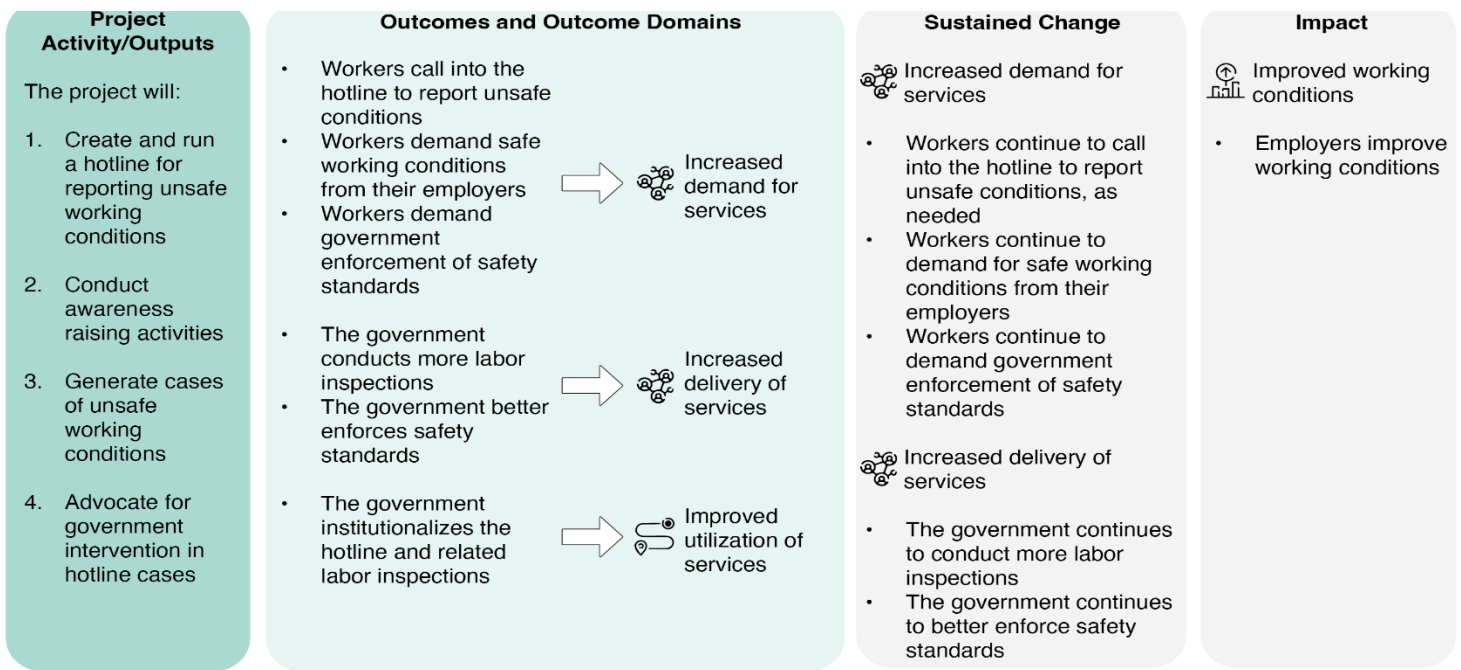
SFWI Project Stakeholder Perspectives

How does the situation look from the perspective of the selected stakeholder?

**[Stakeholder] wants [change or stasis in the situation]
by [how change/stasis should be achieved]
so that/in order to/because [motivation for change/stasis].**

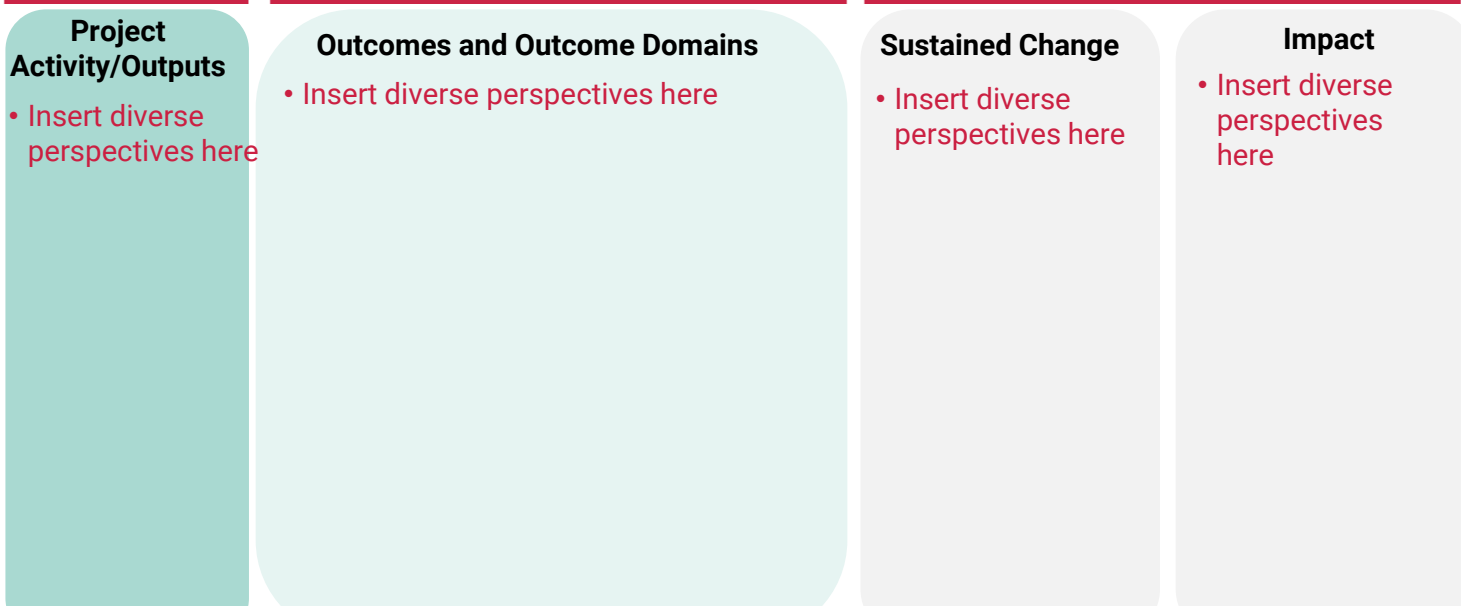
Note: A single stakeholder group may embrace multiple and/or contradictory perspectives. Draft multiple perspective statements as needed. Monitoring during implementation will provide evidence to prove/disprove these assumptions.

SFWI Logic Model



Sphere of Control	Sphere of Influence	Sphere of Interest
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Complex Aspects



Share-back and Discussion