

# Implementation Tips for USAID Partners

Sharing Resources and Knowledge Among the Global CSO Community

Inclusive Development 13 | 2020

## Definitions

**Inclusion:** Ensuring equal access to social, political, and economic opportunities for all people, regardless of differences in personal characteristics or identities.

**Inclusive Development:** The concept that all people, regardless of identity, are instrumental in the transformation of their own society, and their inclusion throughout the development process leads to better outcomes.

**Marginalized Groups:** People who are typically denied full access to legal protection or social and economic participation and programs (such as police protection; political participation; access to healthcare, education, or employment) in practice and/or in principle, for historical, cultural, political, or other contextual reasons.

**Inclusive Development Analysis:** USAID tool to identify marginalized stakeholders affected by a project.

## Inclusion in Monitoring and Evaluation

**Q** How can M&E further inclusion and at the same time be more inclusive?

**A** Monitoring and evaluation (M&E) and inclusion (see Definitions) are both key elements of a project, and each is important to reinforce and advance the other.

On the one hand, M&E activities can provide valuable information that enable you to advance inclusion in your project. For example, by ensuring you collect, disaggregate, and analyze data on different marginalized groups (such as women, youth, people with disabilities, and minority groups), M&E can help you better understand and respond to inclusion and exclusion issues and power dynamics. Also, M&E activities can help you understand how your interventions affect specific groups within the overall target population for a project; this is critical to identify and mitigate potential negative effects (e.g., reinforcing existing inequalities).

On the other hand, evaluation practitioners must include marginalized people (who are often excluded from providing feedback) in M&E processes—i.e., design, data collection, analysis, and dissemination—to ensure that M&E results are valid and valuable to your program. M&E systems are intended to identify outcomes and lessons learned, which often vary among stakeholder groups. Practicing inclusive M&E helps ensure that effects on all groups are captured, so that effectiveness can be maximized for all potential beneficiaries. When stakeholders from marginalized groups are involved in and own evaluation processes, the chances improve that the needs of all stakeholders will be addressed and that findings will better inform effective development interventions.

### How can M&E be inclusive?

Inclusion involves ensuring equal access to social, political, and economic opportunities for all people, regardless of differences in personal characteristics or identities. (For more information see the *Implementation Tip* on [Inclusion and Inclusive Development](#)). Inclusion efforts can take many forms, as illustrated in the Inclusion Continuum (see Figure 1). While you should aim to advance to the highest level of inclusion in M&E by empowering stakeholders to make decisions and identify desired outcomes, your team will need

## Sample Inclusion Analysis Questions

- Which groups of stakeholders face exclusion, stigma, and discrimination?
- What does identity-based inequality look like in the area where the M&E activities will take place?
- What are the structural barriers faced by marginalized groups that might prevent them from participating in M&E activities?

## Key principles of working with marginalized groups

*“Do no harm”:* Ensure that activities do not put any individual or marginalized group at increased risk of harm. The choice to withdraw consent must always be available.

*“Do nothing about them without them”:* Consult with marginalized groups to understand their needs and priorities.

## Resources

Fostering inclusion in M&E must be intentional and can require non-traditional approaches, such as participatory methods. Below are several tools and resources that can be used to promote more inclusive evaluation:

- [USAID’s Inclusive Development Analysis Matrix](#)
- [Participative Ranking Methodology: A Brief Guide](#)
- [Empowerment Evaluation](#)
- [The Barefoot Guide on Mission Inclusion](#)
- [Reflections on Applying Principles of Equitable Evaluation](#)
- [USAID’s Suggested Approaches for Integrating Inclusive Development Across the Program Cycle and in Mission Operations](#)
- [Breaking Barriers in Participation and Inclusion in Peacebuilding Evaluation](#)

to determine what level of inclusion is possible and appropriate for different M&E activities.

Below are suggested ways to incorporate inclusion across M&E processes and activities. Don’t forget to incorporate inclusion efforts in your budget.

*Identifying marginalized groups:* Before M&E activities begin, identify marginalized groups in the project area and use this information to plan how you will include them in your M&E processes and activities. A desk review or stakeholder consultation can help identify these groups. To guide this process, USAID’s inclusive development analysis tool<sup>1</sup> provides a set of key questions and six domains of analysis<sup>2</sup> for each marginalized group identified. The analysis can be used to understand visible and invisible inequities and exclusion dynamics across interventions. A list of sample questions adapted to focus on M&E can be found to the left.

*Planning and implementing M&E activities:* Involve relevant stakeholders, including representatives of marginalized groups you identified, when developing the purpose and plan for your M&E activities (see Figure 1). The M&E team should also ensure that the identities and experiences of all key stakeholder groups, including marginalized groups, are represented during data collection to capture the range of perspectives. When planning M&E activities, the team should work closely with marginalized stakeholders to

Figure 1. Inclusion Continuum



**Inform.** Tell stakeholders the evaluation is taking place and how they might be involved.

**Consult.** Ask stakeholders for input at specific points in the evaluation process.

**Involve.** Work directly with stakeholders and consider their input throughout the process.

**Collaborate.** Engage stakeholders in key activities and decisions during the process.

**Empower.** Give stakeholders the tools and authority to make decisions as leaders in the process.

Graphic is adapted from: <http://tompkinscountyny.gov/tccp/publicparticipation>

- 1 USAID Learning Lab, [Suggested Approaches for Integrating Inclusive Development Across the Program Cycle and in Mission Operations](#)
- 2 Laws, policies, regulations, and institutional practices; cultural norms and beliefs; roles, responsibilities, and time use; patterns of power and decision making; access to and control over assets and resources; personal safety and security

## For More Information

For this or other issues of Implementation Tips, please visit [NGOConnect.net](https://ngoconnect.net).

The Web site is a dynamic and interactive portal dedicated to connecting and strengthening CSOs, networks, and CSO support organizations worldwide.

Funding for this publication was provided by the U.S. Agency for International Development, under the Strengthening Civil Society Globally (SCS Global) Leader Award. Its contents, managed by SCS Global, do not necessarily reflect the views of USAID or the U.S. Government.

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**SCS Global thanks Consortium Partner Social Impact for drafting the content for this Implementation Tip.**

build trust and ensure that these groups are able to participate fully. The team should also consider the needs of different groups when planning activities—including the invitation, location of the activity, the room set-up, and facilitation style.

*Disaggregating data:* When appropriate, in addition to disaggregating monitoring data by sex, disaggregate data by different marginalized groups identified in your community. Disaggregation will allow you to track results for these different groups, identify trends, and conduct comparisons across subgroups. Disaggregation can also hold the project accountable to these groups and ensure the experiences of members of these groups are represented. However, when making the decision about how to disaggregate data, consider the potential implications of maintaining datasets that include sensitive data and whether potential (or accidental) disclosure of that data could harm affected groups or individuals (e.g., data on LGBTQI individuals in a country where homosexuality is illegal).

*Analyzing data:* Key stakeholders should have an opportunity to participate in the interpretation and validation of findings. This will ensure that all perspectives are adequately captured. When involving different stakeholders in interpretation and validation, keep in mind that structural inequalities might inhibit full participation of non-dominant or marginalized groups. To capture multiple interpretations and a more complete analysis, you might want to present and discuss data with different stakeholder groups separately.

*Disseminating evaluation findings:* It is important to define who the audience and expected users are of different results and products and ensure the products and means of dissemination consider their needs—especially the needs of marginalized groups. Organizations should aim to share results and products with as many concerned stakeholders as possible, and should consider using non-traditional formats such as community and small group meetings, to reach marginalized groups.

