



Integrated Planning, Assessment, Reporting and Learning Approach for Continuous Improvement

The world is rife with complex, unyielding and often brutal problems that cross all kinds of boundaries—geographical, sectoral and functional—from the local to the global levels. These problems range in fields from **finance to health to environment to human rights to governance** and are themselves interconnected.

To effectively address today's complex problems requires those working on such issues to have continuous improvement systems that:

- Concretely tie evaluation to strategy development and implementation
- Promote real-time learning, sharing and course-correction
- Gather consistent comparable data at multiple levels and across activity streams

iScale's Integrated Planning, Assessment, Reporting and Learning (IPARL) approach cohesively ties together a range of activities including: planning, data gathering and monitoring, data analysis and evaluation, action learning and reporting. An IPARL approach enables internal *and* external improvement and accountability across a range of stakeholders, aids in strategic planning and can inform future programs and investments. It includes the following components:

- Clearly articulated theory of change
- Clearly articulated partners' theories of action
- Integrated assessment framework
- Reporting and constituency voice
- Learning and sharing mechanisms
- Communications platform

Clearly Articulated Theory of Change (ToC)

The overall framework that describes WHAT (desirable results) an organization or network plans to achieve and HOW it plans to achieve it. It provides a comprehensive and flexible learning framework within which organizations or networks can understand how change happens in their context and how they can best contribute to impact.

Clearly Articulated Individual Partner Theories of Action (ToA)

Applicable for network-oriented work – A theory of change elucidates the collective network approach, helps individual network actors map the ecosystem in which they work and identify the other actors and factors that positively or negatively affect their work. A theory of action explicates the specific impact pathways that guide individual actor's actions and activities. It articulates how an individual actor will contribute toward collective network outcomes while also pursuing internal purposes as well. This helps to ensure coordinated collective action at all levels.

An Integrated Assessment Framework

An integrated assessment framework links monitoring & evaluation (M&E) with impact evaluation (IE) increasing the latter's relevance and utilization while decreasing its cost. It collects consistent and comparable data across partners, contexts and action streams. Specifically, it includes:

- A set of baseline data at multiple levels
- Data collection and monitoring procedures
- Periodic evaluation – including impact evaluation.

Reporting and Constituency Voice

Public and donor reporting promotes accountability across a range of stakeholders including donors, partners, beneficiaries etc. Making results publically available ensures that they can be verified, debated and refuted by key stakeholders. This feedback can contribute to learning and course correction. Properly organized, such 'constituency voice' is a form of validation of the organization's impact. Adding these lessons to the body of publically available knowledge can also provide rich information for future initiatives.

Effective mechanisms for constituency voice involve collecting views and feedback from the key stakeholders on an ongoing basis combined with constituency dialogue processes. Constituency voice:

- Provides new insight about effects on key constituents, can inform the organization or network's assessments of its efforts, and help it to course correct.

- Informs the organization or network's understanding of important, new aspects of its performance.
- Empowers constituents by amplifying their voice. The process gives constituents a new opportunity to participate in the network and increase their sense of stake in it.
- Helps the organization or network grow in legitimacy as a result of its visible efforts to be accountable to its constituents.

Learning and Sharing Mechanisms

Structured activities that create space for the organization or network members and constituents to reflect and analyze monitoring and evaluation results are necessary in order for learning and course-correction in real time. Lessons learned will be shared across partners to scale-up success and overcome challenges. Such learnings can, and should, be used as a planning input to future programs and investment as a way to maximize impact.

Communications Platform

The design of a communications platform is critical, as it must support the collection of monitoring and evaluation data, constituency feedback, reporting as well as learning and course correction. The platform will support the entry, collection and reporting of M&E data as well as, for example, partner stories, discussions and joint collaboration on document creation. The platform should be designed taking a user-centered approach, so as to build a system that meets the needs of the organization or network and its partners and their common work practices.

Innovations for Scaling Impact (iScale) is a networked social enterprise committed to creating, developing, applying, promoting and sharing the innovations necessary to scale impact to address the world's most pressing challenges. iScale has developed a set of high value "innovations for scaling impact" in the areas of impact assessment, research and evaluation, multi-stakeholder processes, communities of practice and networks. Our work focuses on applying these innovations in five main issue areas: peace and security, transparency and good governance, climate and environment, health and livelihoods and global finance. For more information on iScale please visit our website at www.scalingimpact.net or contact us at info@scalingimpact.net

IPARL in Action: Campaign to End Pediatric HIV/AIDS

The three-year Campaign to End Pediatric HIV/AIDS (CEPA) is a multi-stakeholder, multi-level (local to global) advocacy effort. Its primary goals are to: increase coverage rates for PMTCT+ and pediatric treatment services currently between 30% and 40% to the globally agreed target of 80% and ensure high quality services. Specifically, the campaign is designed to overcome key policy and implementation bottlenecks that have historically impeded the scaling up of pediatric prevention, treatment, and care in six countries in sub-Saharan Africa.

The Global Aids Alliance, the group leading CEPA, recognized from the start that they would need a system that could provide them with real time feedback about what was and what was not working across all six countries so that they could effectively manage and guide the campaign. They needed to be able to identify and capitalize on new opportunities as they arose, course correct to avoid failures and record lessons learned to inform future campaigns. There was also external pressure from donors to demonstrate impact and meet accountability standards that required CEPA to undergo a mid-term and final external evaluation. iScale began working with CEPA and its donor in August, 2009, to help them marry these two purposes by developing an IPARL system for CEPA.

iScale supported GAA to develop an outcomes-oriented strategy, three-year implementation plan and an IPARL system to: 1) establish a cross-campaign framework which will enable learning to adapt and improve project activities in real-time to scale impact and 2) specifically measure progress towards CEPA's advocacy goals. iScale worked with GAA and CEPA Partners in developing open data systems for the collection and dissemination of global health data from the country, regional, and global levels of governments, civil society, and citizen action, to measure and spur further action on the eradication of pediatric HIV/AIDS.