

- **Burmese Community Development Collaboration (BCDC)**

# PLANNING, MONITORING, EVALUATION AND LEARNING **POLICY**

Version 2.0

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## 1. INTRODUCTION

### 1.1 Purpose of the PMEL Policy

The purpose of this Planning, Monitoring, Evaluation and Learning (PMEL) Policy is to define the commitment of the Burmese Community Development Collaboration (BCDC) to achieving quality and effectiveness in all areas of its work. This policy provides a comprehensive framework to ensure that all BCDC initiatives—whether development-focused, humanitarian, or community-based—are informed by robust planning, monitored systematically, evaluated ethically and rigorously, and continuously improved through structured learning processes.

This policy is designed to:

- Embed a culture of evidence-informed decision-making across BCDC;
- Ensure that planning and implementation are participatory and accountable;
- Support timely and effective adaptation through feedback mechanisms;
- Uphold transparency and responsiveness to stakeholders, including primary stakeholders and rightsholders;
- Enable consistency and quality in how data, performance, outcomes, and learning are captured, reported, and used across the organization.

### 1.2 Scope and Applicability

This policy applies to all BCDC programs and initiatives, regardless of size, scale, funding source, or geographic scope. It governs the work of all BCDC personnel and associates, including:

- Staff (full-time, part-time, and casual),
- Volunteers and interns,
- Board members and strategic advisors,
- Program and project partners,
- Contractors and consultants,
- Community focal persons and facilitators.

It is relevant to both **organizational-level strategies** (e.g., strategic planning and governance) and **project-level initiatives** (e.g., community workshops, service delivery, humanitarian relief).

The policy must be used during:

- Organizational planning and review cycles;
- Project and program design and appraisal;
- Monitoring and evaluation processes;
- Learning reviews and adaptive management practices;
- Partnership development and periodic collaboration reviews.

## 2. DEFINITIONS

This section provides working definitions of key terms used throughout the Planning, Monitoring, Evaluation and Learning (PMEL) Policy. These definitions are adapted to fit BCDC's specific context, and align with ACFID's guidance, international development standards, and BCDC's internal terminology.

### 2.1 Planning

Planning refers to the systematic, inclusive, and evidence-informed process of defining what a program, project, or initiative aims to achieve and how it will be implemented. At BCDC, planning involves:

- Conducting a **contextual and stakeholder analysis** (including risk, gender, inclusion, and power dynamics);
- Developing a **theory of change** that reflects the pathways from inputs to impact;
- Articulating **goals, objectives, outcomes, and activities**;
- Identifying **indicators**, data sources, and performance benchmarks;
- Clarifying the roles and responsibilities of all relevant actors (e.g., staff, partners, communities);
- Establishing feedback mechanisms, reporting timelines, and alignment with strategic goals.

Planning at BCDC is done in collaboration with primary stakeholders, and reflects the priorities, capacities, and rights of those most affected by the intended change.

### 2.2 Monitoring

Monitoring is the **ongoing and systematic process** of tracking the implementation of activities, use of resources, and achievement of expected outputs and outcomes. At BCDC, monitoring helps answer the question: Are we doing what we planned to do, and are we on track to achieve results?

Monitoring involves:

- Collecting both quantitative and qualitative data using standardized tools;
- Disaggregating data by sex, age, disability, and other relevant criteria;
- Regularly analyzing data against predefined indicators and targets;
- Detecting early signals of success, delays, risks, or unintended effects;
- Producing timely reports that inform adaptive decision-making;
- Engaging primary stakeholders and local partners in monitoring activities.

Monitoring is carried out throughout the program cycle, using participatory methods whenever feasible.

## 2.3 Evaluation

Evaluation is the **periodic, systematic, and objective assessment** of an initiative's design, implementation, results, and overall impact. It is conducted to understand what worked, what didn't, and why, and to inform decisions on program improvement, learning, accountability, and future strategy.

Evaluations at BCDC may be internal (led by BCDC staff), external (led by independent evaluators), or joint (co-led with partners). All evaluations must:

- Be guided by clear Terms of Reference (ToR);
- Use appropriate and ethical methodologies;
- Include the perspectives of primary stakeholders;
- Examine effectiveness, efficiency, relevance, impact, and sustainability;
- Be documented and disseminated transparently;
- Generate actionable recommendations and insights.

Evaluations are typically conducted at mid-term and end-of-project stages but may also occur after strategic milestones or significant shifts in context.

## 2.4 Learning

Learning is the **intentional process** of reflecting on evidence, experience, and stakeholder input to improve practice and enhance impact. At BCDC, learning is embedded as a core organisational value and is understood as both a process and an outcome of effective PMEL.

Learning may occur at multiple levels:

- **Individual:** Personal insights from fieldwork, training, or monitoring experiences;
- **Team:** Structured reflection sessions, after-action reviews, and staff debriefs;
- **Organisational:** Periodic strategic reviews, policy updates, and knowledge-sharing;
- **Community / Partner:** Community feedback loops, learning exchanges, and participatory reviews.

Learning is documented, shared, and used to inform strategic planning, design revisions, partnerships, and policy development. It is inclusive, action-oriented, and supports innovation.

## 2.5 Theory of Change and Results Frameworks

### Theory of Change (ToC)

A **Theory of Change** is a logical and contextualized explanation of how and why a set of activities will lead to desired changes. It maps the relationship between **inputs, activities, outputs, outcomes, and impacts**, while also articulating:

- The underlying assumptions about change;
- The role of stakeholders;
- External factors and risks that may influence outcomes.

At BCDC, each major project or program must be guided by a theory of change that is developed collaboratively with staff, partners, and primary stakeholders.

### Results Framework

A **Results Framework** operationalizes the theory of change by providing measurable indicators, data sources, targets, and timelines. It enables systematic monitoring and evaluation of progress. Each results framework includes:

- Strategic goals and objectives;
- SMART indicators (Specific, Measurable, Achievable, Relevant, Time-bound);
- Baseline data and performance targets;
- Means of verification;
- Assigned responsibilities and reporting frequencies.

Results frameworks are essential for donor reporting, performance tracking, and results-based management at BCDC.

### 3. PMEL PRINCIPLES AND APPROACH

The effectiveness of Planning, Monitoring, Evaluation and Learning (PMEL) at BCDC is not only determined by the tools and processes used, but also by the principles that guide them. These principles reflect BCDC’s organisational values and its commitment to quality, inclusion, and accountability in line with the ACFID Code of Conduct.

#### 3.1 Equity, Participation and Inclusion

BCDC recognizes that meaningful and sustainable change is only possible when those most affected by poverty, marginalization or injustice are empowered to shape the solutions. Therefore, equity, participation and inclusion are embedded across all PMEL stages.

BCDC ensures that:

- Primary stakeholders (especially women, children, persons with disabilities, and ethnic minority groups) are actively involved in designing, monitoring, and evaluating programmes;
- Consultation methods are culturally appropriate and accessible (e.g. language translation, use of local facilitators, child- or disability-friendly formats);
- Marginalized voices are specifically sought and prioritized in planning and reflection processes;
- Data is disaggregated by sex, age, disability status, and other context-relevant variables to uncover and respond to patterns of exclusion.

Participation is not limited to consultation—it includes joint ownership, co-analysis, and co-decision making where feasible.

#### 3.2 Accountability and Transparency

PMEL at BCDC is rooted in mutual accountability—between the organization, communities, donors, and partners. Accountability mechanisms are built into every PMEL phase to ensure that information is not only collected, but also communicated and acted upon.

BCDC commits to:

- Transparently sharing information about goals, results, challenges, and evaluations with stakeholders in accessible formats;
- Facilitating inclusive community feedback and complaints mechanisms (in line with BCDC’s Complaint Handling Policy);
- Documenting and responding to issues raised through monitoring or evaluations;
- Ensuring partners and staff understand and uphold their PMEL responsibilities, including ethical and safeguarding standards.

Transparency also involves sharing both successes and failures as opportunities for learning.

### **3.3 Evidence-Based and Adaptive Management**

BCDC operates in dynamic contexts where flexibility and responsiveness are essential. PMEL is not a compliance exercise but a tool for real-time learning and decision-making. BCDC uses evidence from data, experience, and stakeholder input to adaptively manage its work and maximise impact.

This means:

- Basing programmatic decisions on data and community feedback rather than assumptions;
- Using monitoring findings and mid-term evaluations to make course corrections;
- Testing new approaches or innovations in a controlled and documented manner;
- Recognising uncertainty and adjusting plans without compromising integrity or transparency.

Adaptive management ensures that programmes remain relevant, effective, and grounded in real-time realities.

### **3.4 Accessibility and Context-Specific Flexibility**

PMEL systems and tools must be accessible, practical, and proportionate to the context. BCDC acknowledges that a one-size-fits-all approach is inappropriate for diverse programmes or community settings.

To ensure flexibility, BCDC:

- Designs PMEL frameworks that can be scaled up or down depending on project size, risk, and duration;
- Trains staff and partners in using simplified or locally adapted tools where needed;
- Makes allowances for differing literacy levels, internet access, or resource constraints in the field;
- Encourages community-led monitoring and informal reflection methods when formal mechanisms are not feasible.

The goal is to maintain quality and accountability without overburdening teams or communities with excessive technical requirements.

## 4. PMEL FRAMEWORK AND PROCESSES

The BCDC PMEL Framework outlines how planning, monitoring, evaluation and learning are integrated into the entire project and organizational life cycle. These processes are not linear, but cyclical and mutually reinforcing—ensuring that evidence and reflection inform continuous improvement, accountability, and innovation.

This section describes each component of the PMEL cycle in detail and clarifies how these processes are operationalized across the organization.

### 4.1 PMEL Cycle Overview

The PMEL cycle at BCDC comprises four interrelated phases:

1. **Planning** – establishing objectives, assessing context, defining expected results, and setting up the mechanisms to measure progress.
2. **Monitoring** – regularly collecting and analyzing information to assess implementation and flag early successes, delays, or risks.
3. **Evaluation** – conducting systematic, objective assessments of relevance, effectiveness, efficiency, impact, and sustainability.
4. **Learning** – reflecting on and documenting results, challenges and lessons, and using this knowledge to adjust practices and influence future programming.

Each phase includes specific tools, responsibilities, and reporting requirements, supported by organizational policies and standard operating procedures.

## 4.2 Planning Phase

Planning is the foundation of program quality. At BCDC, planning is participatory, rights-based, and strategically aligned. It is conducted at multiple levels: organizational (e.g. Strategic Plan), programmatic (e.g. thematic priorities), and project-level (e.g. local interventions).

Key activities during planning include:

- **Context analysis:** Identifying political, economic, environmental, and social dynamics that may affect program design or delivery.
- **Stakeholder analysis:** Understanding who is affected, who holds power, and who should be included, with emphasis on marginalized or underrepresented groups.
- **Theory of Change development:** Mapping the logical pathways from activities to desired change, including assumptions and external risks.
- **Results Framework design:** Setting clear goals, outcomes, indicators, and targets.
- **Risk analysis and mitigation planning:** Assessing risks (including unintended harm, safeguarding risks, advocacy threats) and documenting mitigation strategies.
- **Budget alignment and resource planning:** Ensuring that PMEL processes are costed and resourced.
- **Integration of cross-cutting priorities:** Embedding gender equality, disability inclusion, safeguarding, environmental sensitivity, and local ownership.
- **Stakeholder participation:** Consulting primary stakeholders to validate plans and promote shared ownership.

All program plans must be documented using BCDC's Design and Planning Template and appraised before implementation, as per the BCDC Appraisal and Selection Protocol.

## 4.3 Monitoring Phase

Monitoring provides real-time information on whether planned activities are being implemented effectively and whether intended results are being achieved. It enables corrective actions and helps demonstrate accountability.

### **BCDC's monitoring system includes:**

- **Monitoring Frameworks:** Developed for each project, with clearly defined indicators, baselines, targets, data sources, and timelines.
- **Data Collection Tools:** Standardized tools (surveys, observation checklists, focus group templates) that are adapted to local languages and formats.
- **Disaggregation Protocols:** All data must be disaggregated by sex, age, disability, and other context-relevant criteria where feasible.
- **Partner Engagement:** Local partners are trained and supported to conduct joint monitoring and field visits.
- **Monitoring Visits and Field Reports:** Field visits are planned quarterly or at key milestones, using structured monitoring report templates.
- **Risk and Safeguarding Tracking:** Monitoring includes checking for safeguarding concerns, community grievances, and emerging protection risks.
- **Internal Data Review Meetings:** Monitoring results are discussed within project teams to inform adaptive decisions.

Findings from monitoring are summarized in quarterly or six-monthly reports and shared with relevant stakeholders as appropriate.

## 4.4 Evaluation Phase

Evaluation allows BCDC and its stakeholders to assess whether program are making a meaningful difference and what factors are contributing to (or limiting) their success. Evaluations may be formative (mid-term), summative (end-of-project), or thematic (cross-cutting issues like inclusion or safeguarding).

### All evaluations at BCDC must:

- **Follow a Terms of Reference (ToR):** Clearly define purpose, scope, questions, methods, and ethical standards.
- **Use participatory methods:** Include voices of women, children, persons with disabilities, and other primary stakeholders in data collection and validation.
- **Ensure independence and credibility:** Where possible, evaluations are led by external consultants or third-party reviewers.
- **Assess core criteria:** Relevance, effectiveness, efficiency, impact, and sustainability, along with cross-cutting commitments.
- **Comply with safeguarding protocols:** Evaluators must sign and comply with the BCDC Code of Conduct and Safeguarding Policies.
- **Include community feedback mechanisms:** Findings must be returned to communities and partners in accessible formats (e.g. summary workshops, translated reports).
- **Generate learning and recommendations:** All evaluations must include practical, evidence-based recommendations with designated actions.

Evaluation reports are reviewed by senior leadership, shared with relevant stakeholders (including donors), and used to inform policy, design, or partnership decisions.

## 4.5 Learning and Adaptation Phase

Learning is the most critical yet often underused element of the PMEL cycle. At BCDC, learning is structured, documented, and prioritized as a mechanism for improving both program outcomes and organizational effectiveness.

### BCDC supports learning through:

- **Reflection Workshops:** Organized at the end of each program phase, bringing together staff, volunteers, partners, and, where feasible, community members.
- **After-Action Reviews:** Used following major events (e.g. humanitarian responses, policy shifts) to assess what worked, what didn't, and why.
- **Learning Templates and Documentation:** Standard forms for capturing lessons learned, innovation, and promising practices.
- **Internal Knowledge Management:** Lessons are stored in shared folders, and key learnings are summarized and shared across teams.
- **Organizational Review Meetings:** Senior staff meet annually to review evaluation findings and reflect on strategic implications.
- **Donor and Public Dissemination:** Where appropriate, lessons learned are shared externally through reports, newsletters, workshops, or community debriefings.

Learning must result in adaptation—changes in design, policies, partnerships, or systems. These changes must be tracked and recorded to demonstrate responsiveness.

## **5. OPERATIONALISING PMEL AT BCDC**

This section outlines how BCDC translates its PMEL principles and framework into practice across all levels of its work. It defines the internal systems, staff responsibilities, tools, and reporting protocols that enable high-quality planning, monitoring, evaluation, and learning. PMEL is embedded as a core function of program management, not an add-on or compliance task. All BCDC personnel, from board members to field-level staff and volunteers, are expected to actively contribute to a learning culture and apply PMEL practices with integrity, inclusion, and professionalism.

## 5.1 Roles and Responsibilities

BCDC assigns clear PMEL responsibilities across different organizational levels to ensure ownership, quality, and follow-through.

### Board of Directors and Executive Leadership

- Provide strategic oversight of PMEL implementation.
- Review and endorse evaluation findings, strategic reviews, and annual learning reports.
- Ensure PMEL findings influence policy, governance decisions, and resource allocation.

### Executive Director

- Champions a culture of reflection, adaptation, and evidence-based planning.
- Ensures PMEL policy compliance and accountability across all departments.
- Approves evaluation ToRs, learning agendas, and monitoring priorities.

### Program Managers / Project Leads

- Lead program-level PMEL implementation.
- Oversee the design of results frameworks and monitoring plans.
- Coordinate regular monitoring and reflection activities with partners.
- Ensure monitoring findings and evaluation results are documented and acted upon.

### Monitoring and Evaluation (M&E) Focal Points

- Develop PMEL tools (e.g. log frames, data collection forms, monitoring schedules).
- Provide technical assistance to staff and partners on data collection and analysis.
- Ensure quality assurance of monitoring reports and evaluations.
- Maintain data management systems and reporting archives.

### Community Facilitators / Field Officers

- Support participatory data collection and feedback processes at community level.
- Ensure communities understand the purpose of data collection and how their views will be used.
- Report incidents, concerns, or learning observations during implementation.

### Partners and Implementing Agencies

- Participate in joint planning, monitoring visits, and evaluation activities.
- Provide monitoring data and progress reports according to agreed formats and schedules.
- Share local learning, challenges, and contextual insights.

### Volunteers and Interns

- Assist with documentation, translation, and reflection facilitation where appropriate.
- Comply with safeguarding and confidentiality standards during data-related tasks.

PMEL roles and responsibilities must be included in job descriptions, partnership agreements, and team orientation processes.

## 5.2 PMEL Tools and Templates

BCDC maintains a suite of standardized and field-adaptable PMEL tools, which all program and projects are expected to use. These tools promote consistency, streamline reporting, and enable comparability across programs.

### Key PMEL tools include:

- **Project Design Template** – captures problem analysis, objectives, theory of change, and context risks.
- **Results Framework Template** – includes indicators, baselines, targets, disaggregation criteria, and data sources.
- **Monitoring Plan Template** – outlines frequency, methods, responsible persons, and data flow.
- **Field Monitoring Report Format** – standard layout for summarising findings from site visits.
- **Partner Progress Report Template** – used by sub-grantees to report against indicators and activities.
- **Evaluation ToR Template** – provides structure for defining the scope and deliverables of evaluations.
- **Learning Reflection Template** – used during structured reflection sessions to capture what worked, what didn't, and lessons learned.
- **PMEL Calendar Template** – tool to help project teams schedule M&E activities throughout the year.

Tools are reviewed and updated annually by the M&E focal points to ensure usability and alignment with donor or strategic shifts.

## 5.4 Use of Results and Feedback Loops

Data and findings must lead to action. BCDC ensures that PMEL information is not just collected but used to inform strategy, improve delivery, and demonstrate accountability to stakeholders.

### **BCDC ensures data is used through:**

- **Regular Team Reviews:** Staff teams review progress data and monitoring reports monthly or quarterly to decide on needed adjustments.
- **Adaptive Work Plans:** Project work plans are updated based on new insights from monitoring, evaluation, or community feedback.
- **Decision-Making Processes:** Evaluation findings feed into program renewal, funding decisions, and resource allocation.
- **Community Feedback:** Results are shared back with primary stakeholders in accessible formats (e.g. translated summaries, posters, meetings).
- **Donor and Partner Updates:** Learning and results are communicated through scheduled reporting cycles and stakeholder briefings.
- **Organization-Wide Learning:** Lessons from individual projects are synthesized into thematic learning briefs to inform strategy and training.

**Closing the feedback loop**—acting on what is learned and communicating that back to stakeholders—is a non-negotiable principle for all BCDC projects.

## **6. STAKEHOLDER ENGAGEMENT IN PMEL**

BCDC recognizes that effective Planning, Monitoring, Evaluation and Learning (PMEL) requires meaningful, inclusive, and sustained engagement with all relevant stakeholders—particularly those who are directly impacted by our work. This includes primary stakeholders (such as community members, beneficiaries, and rightsholders), implementing partners, donors, and other civil society actors.

BCDC’s approach to stakeholder engagement is grounded in the belief that those closest to the issues are best placed to inform, guide, and assess development and humanitarian responses. Engagement must go beyond information-sharing and ensure active participation, shared learning, and mutual accountability.

## 6.1 Participation of Primary Stakeholders

Primary stakeholders—especially women, children, persons with disabilities, ethnic and religious minorities, and other marginalized or at-risk groups—are central to BCDC’s PMEL system. Their knowledge, priorities, and lived experiences must inform all stages of the program cycle.

### BCDC ensures participation through:

- **Inclusive Consultations:** Conducted during program design to ensure local ownership and contextual relevance. Tools such as focus group discussions, household interviews, community mapping, and participatory planning exercises are used.
- **Co-design of Indicators:** Where appropriate, community members help define what “success” looks like, leading to more meaningful and locally relevant indicators.
- **Community-Based Monitoring:** Trained local focal points and community members assist in data collection, observation, and reporting.
- **Participatory Evaluations:** Primary stakeholders participate in evaluation teams, provide feedback on preliminary findings, and validate conclusions.
- **Feedback on Results:** All monitoring and evaluation findings are shared with communities in accessible and culturally appropriate ways, such as community meetings, printed materials in local languages, or audio formats.

BCDC also takes deliberate steps to address barriers to participation by:

- Scheduling meetings at convenient times and venues;
- Providing child care and travel stipends when possible;
- Using translators or facilitators for participants with limited literacy or language proficiency;
- Ensuring safe and supportive spaces, especially for women and vulnerable groups.

All engagement processes are conducted in line with BCDC’s Safeguarding Policy, Child Protection Guidelines, and Do No Harm principles.

## 6.2 Collaborations and Partnerships

BCDC engages in collaborative partnerships with local civil society organizations, service providers, and international allies. These partnerships are not only instrumental in program implementation but also contribute significantly to PMEL effectiveness.

**Joint PMEL practices include:**

- **Co-development of program design and monitoring frameworks;**
- **Shared responsibilities** in collecting and analyzing monitoring data;
- **Collaborative reflection and learning workshops** where findings are discussed openly and used to improve programming;
- **Joint evaluations**, especially for larger or multi-stakeholder projects;
- **Review of partnership performance**, including feedback on communication, capacity-building, and shared decision-making.

Partnerships are governed by written agreements that include clauses on PMEL participation, data ownership and sharing, safeguarding, and mutual learning expectations. Periodic reviews of partnership effectiveness (see Section 7.3) help ensure that relationships remain transparent, equitable, and responsive.

## 6.3 Inclusive Consultation Mechanisms

BCDC employs diverse and context-sensitive consultation methods to ensure that all voices—especially those of marginalized groups—are heard, valued, and acted upon. These mechanisms are used at various stages of the program cycle and are tailored to the community context.

**Consultation mechanisms include:**

- **Community Assemblies and Public Hearings:** Held during planning or review phases to gather broad-based input.
- **Focus Group Discussions (FGDs):** Conducted with specific demographic groups (e.g. women, youth, elders, persons with disabilities) to explore specific themes or risks.
- **Individual Interviews / Testimonies:** Especially useful for sensitive topics or protection-related concerns.
- **Mobile / Digital Feedback Tools:** Such as SMS surveys or phone-based interviews for areas with limited access or security concerns.
- **Suggestion Boxes and Community Feedback Forms:** Managed by community focal points and regularly reviewed by field staff.
- **Participatory Learning and Action (PLA) Tools:** Visual and creative tools used with low-literacy populations to support decision-making and program assessment.

All consultation data is ethically collected, stored, and analyzed, with due regard to informed consent, privacy, and cultural sensitivity.

BCDC also ensures that **feedback loops are closed**—meaning that communities are informed of what was done with their input, how decisions were influenced, and what the next steps will be.

## **7. QUALITY ASSURANCE AND COMPLIANCE**

BCDC is committed to delivering high-quality, effective, and ethically grounded development and humanitarian initiatives. This commitment is embedded in the organization's internal policies and reflected in its adherence to the ACFID Code of Conduct. The PMEL system serves as a critical mechanism to assure the quality of programming, demonstrate accountability to stakeholders, and drive continuous improvement.

Quality assurance within PMEL is achieved through defined standards, regular internal reviews, systematic documentation, and alignment with recognized external benchmarks, including ACFID's Quality Principles and Compliance Indicators.

## 7.1 Alignment with ACFID’s Quality Assurance Framework (QAF)

BCDC’s PMEL system directly contributes to meeting the following key QAF indicators under Quality Principle 4: Quality and Effectiveness:

QAF Indicator	BCDC Implementation Approach
<b>4.1 – Clear strategic goals are articulated</b>	All program must align with BCDC’s Strategic Plan 2024–2027 and include defined outcomes, indicators, and results frameworks.
<b>4.2 – Context and stakeholder analysis are integrated into design</b>	Every programme includes structured context analysis, power mapping, and consultation with primary stakeholders.
<b>4.3 – Monitoring and evaluation are systematically conducted</b>	Each initiative includes a monitoring plan and regular evaluations, with guidance from BCDC’s PMEL tools.
<b>4.4 – Lessons and results are documented and shared</b>	Learning templates and reflection processes ensure results are captured, used, and disseminated internally and externally.

The PMEL system also supports indicators from other Quality Principles, including:

- **1.2, 2.1, 2.3–2.5:** Promoting inclusion, gender equality, child rights, and participation of persons with disabilities.
- **3.1–3.3:** Addressing causes of poverty and power imbalances, strengthening local capacities, and managing advocacy risk.
- **5.3.2:** Reviewing partnerships through mutual reflection and documented performance assessments.

Compliance with these indicators is periodically assessed by BCDC through internal audits, reflection workshops, and external review mechanisms (e.g., donor reporting or independent evaluations).

## 7.2 Internal Review and Policy Updates

BCDC recognizes that maintaining relevance and integrity in PMEL requires regular review and adaptation of this policy and its supporting systems.

**The PMEL Policy will be reviewed at least every two years**, or sooner if one of the following occurs:

- Substantial updates to the ACFID Code of Conduct or relevant compliance indicators;
- Major strategic or operational shifts within BCDC;
- Recommendations from evaluations, audits, or stakeholder feedback;
- Significant contextual changes affecting program implementation.

The review process will be **inclusive and participatory**, involving:

- Input from staff across all operational levels;
- Feedback from partners and primary stakeholders where relevant;
- Oversight and endorsement from BCDC's Executive Leadership and Board;
- Technical input from PMEL focal points and external advisers, if needed.

Updates to the policy will be clearly communicated across the organization and integrated into staff orientation, partner briefings, and internal learning resources.

### 7.3 Integration with Other BCDC Policies and Systems

The PMEL Policy is designed to complement and strengthen BCDC’s broader governance and compliance framework. It is directly linked with the following core policies and documents:

Document / Policy	PMEL Integration Focus
<b>Strategic Plan 2024–2027</b>	PMEL tracks and evaluates progress towards the ten Strategic Goals and the integration of cross-cutting themes.
<b>Financial Wrongdoing and Risk Management Policy</b>	Risk assessments conducted during planning and monitoring phases feed into risk registers and financial oversight.
<b>Volunteer Manual</b>	Volunteers are guided on ethical participation in data collection, learning, and reporting.
<b>Complaint Handling Policy</b>	Monitoring includes a review of complaint patterns and community feedback to strengthen accountability.
<b>Child Safeguarding Policy and PSEAH Policy</b>	Evaluation tools and reporting mechanisms incorporate checks on safety, consent, and protection issues.
<b>Non-Development Activity Policy</b>	Monitoring frameworks distinguish between development and non-development activities, ensuring financial and programmatic separation as per RDE guidelines.

PMEL data is also used to inform:

- Donor reports;
- Organizational reviews;
- Partnership assessments;
- Strategic decision-making;
- Advocacy positioning.

The integrity and coherence of BCDC’s policies are maintained through cross-referencing, coordinated reviews, and harmonized templates.

## 8. CONCLUSION

The BCDC Planning, Monitoring, Evaluation and Learning (PMEL) Policy sets out a comprehensive framework to ensure that all development and humanitarian initiatives are implemented with integrity, accountability, and continuous learning.

By applying this policy, BCDC reaffirms its commitment to:

- Designing evidence-informed programs that respond to community needs;
- Monitoring implementation in real time to ensure effectiveness and inclusion;
- Evaluating outcomes and impact with transparency and rigour;
- Embedding learning into practice to improve future programming.

All BCDC staff, volunteers, partners, and stakeholders are responsible for upholding the principles and processes outlined in this policy. Successful implementation requires not only compliance, but active participation, reflection, and a willingness to adapt.

The PMEL Policy is a living document. It will be reviewed regularly to ensure its continued relevance and effectiveness in guiding BCDC's work in a dynamic and complex environment.

## ANNEX A – MONITORING FRAMEWORK TEMPLATE

### Purpose of the Monitoring Framework

This Monitoring Framework is a foundational PMEL tool for tracking progress, measuring results, and informing adaptive management across all BCDC projects. It must be developed during the design phase, used throughout implementation, and updated periodically as the project evolves.

The Monitoring Framework supports:

- Continuous performance monitoring
- Evidence-based reporting
- Inclusion and participation
- Transparency and accountability
- Real-time learning and adaptive planning

### Who Should Use This Template

- **Project Managers and Team Leaders:** Lead the creation of the framework during project design and coordinate updates.
- **Monitoring & Evaluation (M&E) Focal Points:** Provide technical support, review indicator quality, and ensure data collection is feasible and aligned with project needs.
- **Field Coordinators and Community Facilitators:** Participate in defining practical data collection methods and ensure community involvement.
- **Partner Organizations:** Collaborate on indicator selection and share responsibility for data collection and reporting.

## Monitoring Framework Table Template

Column Title	What It Means and How to Fill It Out
<b>Objective / Outcome</b>	Clearly state what the project or activity is trying to achieve. This should be aligned with your project’s results framework or logframe. Outcomes are medium-term changes, not activities. Example: “Improve access to education for displaced children.”
<b>Indicator</b>	Specify exactly what you will measure to determine progress. Indicators should be SMART (Specific, Measurable, Achievable, Relevant, Time-bound). Example: “% of displaced children aged 6–14 enrolled in school.” Use disaggregated indicators where relevant (e.g., by gender, age, disability).
<b>Baseline</b>	Provide the starting point—what is the current status before your intervention begins? If this information is unavailable, note it as “TBD” and indicate plans to collect baseline data early in the project. Example: “60% enrolment rate as per 2023 needs assessment.”
<b>Target</b>	Specify the level of change you aim to achieve. Targets must be realistic and should reflect the full project timeframe. Example: “85% enrolment by December 2025.”
<b>Data Source</b>	Describe where or from whom the data will be collected. Use credible, accessible, and appropriate sources. Example: “School attendance registers,” or “Household survey responses.”

Column Title	What It Means and How to Fill It Out
<b>Data Collection Method</b>	State how the data will be collected. Methods may include structured interviews, observation checklists, digital surveys, FGDs, or document review. Choose methods that are ethical and culturally appropriate. Example: "Community interviews and school visits."
<b>Frequency</b>	Indicate how often data will be collected. Frequency should be realistic and depend on the indicator type (e.g., quarterly for process indicators, annually for outcomes). Example: "Quarterly."
<b>Responsible Person(s)</b>	Assign who is responsible for collecting or verifying the data. This can be a project officer, M&E officer, partner staff, or community monitor. Example: "Field Coordinator and Partner M&E Officer."
<b>Means of Verification</b>	List what documents or materials will be used to confirm the results. These should be tangible and accessible. Example: "Signed enrolment forms, survey database, attendance registers, GPS-stamped photos."

## Sample Monitoring Framework Table

Objective / Outcome	Indicator	Baseline	Target	Data Source	Data Collection Method	Frequency	Responsible	Means of Verification
Improve access to primary education for displaced children in "Region X"	% of displaced children (ages 6-14) enrolled in school	60% (Survey 2023)	85% by Dec 2025	Household survey, school registers	Household interviews, school visits	Quarterly	Field Coordinator, Partner M&E Officer	Enrolment forms, survey database
Enhance women's leadership in community committees	Number of women in committee decision-making roles	10 (2023)	30 by end of project	Committee records, meeting attendance	Document review, interviews	Bi-annually	Gender Focal Point	Meeting minutes, role registers
Increase awareness of child safeguarding among partners	% of partner staff trained on child safeguarding	N/A	100% by March 2025	Training attendance sheets	Post-training evaluation forms	After each training	Safeguarding Officer	Training reports, sign-in sheets
Improve hygiene behaviours among households	% of households with functional handwashing stations	45% (2023 baseline survey)	70% by Dec 2024	Household visits, community monitors	Visual inspection, checklist scoring	After each training	Community Health Facilitators	Photos, inspection logs

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### Tips for Effective Use

- **Design with Participation:** Involve project teams, local partners, and communities in developing the framework. This increases accuracy, ownership, and practicality.
- **Update As Needed:** Revisit your monitoring framework at each project review point. If your context or activities change, so should your monitoring approach.
- **Use to Inform:** Monitoring is not just for donor reports—it's for your team to understand what's working and adjust what's not.
- **Disaggregate:** Collect data by gender, age, and disability status to promote inclusion and identify disparities.
- **Document Ethically:** Always obtain consent when collecting data from individuals, and never share sensitive personal information without permission.
- **Link to Learning:** Feed your findings into reflection sessions, team debriefs, and partner meetings to foster a culture of learning.

## ANNEX B – EVALUATION TERMS OF REFERENCE (TOR) TEMPLATE

### Purpose

This template provides a structured guide for drafting Terms of Reference (ToR) for evaluations of BCDC programs and projects. A clear and detailed ToR ensures that evaluations are relevant, ethical, inclusive, and produce actionable learning.

All internal or external evaluations at BCDC must begin with a ToR approved by the Program Manager and Executive Director. It must be shared with evaluators, partners, and relevant stakeholders prior to commencement.

### Who Should Use This Template

- **Program Managers / Project Leads** initiating evaluations.
- **Monitoring & Evaluation Focal Points** supporting technical content.
- **External Evaluators or Consultants** to understand expectations, scope, and deliverables.
- **Partners and Community Representatives** (for participatory or joint evaluations).

## 1. Title of the Evaluation

### Guideline

The title of the evaluation should be concise, informative, and specific. It should clearly communicate what the evaluation is about and distinguish it from other evaluations conducted by BCDC or its partners. A well-crafted title helps readers—including external evaluators, donors, and internal staff—understand the evaluation’s focus at a glance.

The title must include the following elements:

- The type of evaluation (e.g. final, mid-term, thematic)
- The name of the project or program
- The geographic location(s) involved
- The project timeframe or evaluation period (optional but recommended for clarity)

This section of the ToR is also used as the formal reference title in evaluation contracts, reports, internal review meetings, and donor communications.

### Tips for Writing a Strong Title

- Keep it **under 20 words** where possible.
- Avoid generic titles like “Evaluation Report”—they are not useful for tracking or referencing.
- Always specify the **type of evaluation**: use “Final Evaluation,” “Mid-Term Review,” or “Impact Assessment.”
- Include the location—**even if the program operates** nationally, consider listing the specific regions or townships.
- Add the **year(s)** or project timeframe to clarify coverage.
- Use title case (capitalize major words) to ensure consistency across BCDC documents.

### Examples of Strong Titles

- Final Evaluation of the Women’s Livelihoods Empowerment Project – Kayin State, Myanmar (2022–2024)
- Mid-Term Review: Inclusive Education Pilot Project in Mae Sot and Hpa-An (2023–2025)
- Impact Assessment – Youth Peacebuilding Initiative in Southeastern Myanmar (2020–2023)

## 2. Background and Context

### Guideline

This section provides evaluators with a clear understanding of the program or project being evaluated. It should be written in narrative form, giving a concise overview of the project's origin, rationale, scope, and operating environment. It sets the scene for the evaluation by explaining the "what," "where," "who," and "why" of the initiative.

The background should include:

- A brief **summary of the project or program**: title, start and end dates, location(s), implementing partners, funding source(s), and total budget (if public).
- The **project's purpose and intended outcomes**, including its connection to BCDC's broader strategic priorities.
- The **target population or beneficiaries**, including gender, age group, or other demographic features.
- The **implementation context**, such as relevant political, environmental, cultural, or security conditions.
- Any **previous assessments, reviews, or significant changes** to the program (e.g., redesigns, expansions, disruptions).
- **Relevance to stakeholders** (e.g., community needs, donor goals, national policies).

This section must be factual, objective, and written in plain English. Avoid promotional language.

### Tips for Writing the Background and Context

- Keep it to **2–3 paragraphs** (or up to 350 words). Longer is acceptable if the program is large or complex.
- Write as **if your audience knows nothing** about the program—this is especially important for external evaluators.
- Highlight **key milestones** that help explain the timing and purpose of the evaluation.
- Where applicable, **mention partnerships, donors, or sub-grants** that play an important role in delivery or design.
- Avoid jargon—use clear descriptions rather than internal project codes or acronyms (unless explained).
- Include **baseline or initial situation details** if available, as this helps evaluators understand change pathways.

### Example Paragraph

The Women’s Livelihoods Empowerment Project (WLEP) was launched in January 2022 by BCDC in partnership with the Kayin Women’s Development Network. The project is funded by the XYZ Foundation and is scheduled to run until December 2024, with a total budget of AUD 280,000. It operates in 12 rural villages across Hpa-An and Kawkareik townships in Kayin State, Myanmar.

The project aims to improve the income security and leadership capacity of internally displaced women through vocational skills training, small business grants, and community mentoring circles. It aligns with BCDC’s Strategic Goal 5: Strengthen the economic resilience of marginalized women in border regions.

The project was designed based on needs assessments conducted in 2021 and follows a previous pilot phase in three villages. It has faced several implementation challenges due to conflict escalation and displacement patterns. This evaluation seeks to assess the program’s overall effectiveness and draw lessons for scaling up in adjacent areas.

### 3. Purpose and Objectives of the Evaluation

#### Guideline

This section explains **why** the evaluation is being commissioned and **what it aims to achieve**. It sets the strategic direction for the evaluation and ensures that both the evaluator and the commissioning team are aligned on its intended use.

The **purpose** answers the question:

Why is this evaluation needed at this time?

The **objectives** specify what the evaluation will **focus on and deliver**, such as assessing effectiveness, identifying lessons learned, or informing the next phase.

This section should be framed in terms of **learning, accountability**, and/or decision-making. It should also clarify who the primary users of the evaluation findings will be (e.g. BCDC, donors, partners, government, communities).

#### Tips for Writing This Section

- Be specific—**“to assess program effectiveness”** is too general; explain what kind of effectiveness and in relation to what outcomes.
- If the evaluation is **externally required** (e.g. donor contract), state this, but still emphasize its usefulness for learning.
- Clearly link the evaluation objectives to **strategic or programmatic decisions** (e.g. design of a second phase, advocacy strategy).
- If the evaluation serves **multiple purposes**, prioritize them to avoid overloading the scope.
- Make the objectives measurable and realistic—do not ask the evaluator to do too much.

#### Example: Purpose and Objectives

##### Purpose

The purpose of this final evaluation is to assess the outcomes, relevance, and sustainability of the Women’s Livelihoods Empowerment Project (WLEP) in Kayin State, Myanmar. The evaluation is intended to inform BCDC’s future programming in economic empowerment and gender equity, and to fulfil the final accountability requirements of the XYZ Foundation, the project donor.

##### Objectives

The evaluation will:

1. Assess the extent to which the project achieved its intended outcomes in income generation, skills development, and women’s leadership.
2. Examine the relevance of the project design and delivery model in the context of community needs and displacement trends.
3. Evaluate the sustainability of results, including continued use of skills and business operation after the intervention.
4. Identify unintended outcomes—positive or negative—arising from the intervention.
5. Provide actionable recommendations for scaling or adapting the model in other regions.

## 4. Key Evaluation Questions

### Guideline

This section outlines the core questions the evaluation is expected to answer. These questions shape the **evaluation design, data collection methods, and analysis**. Well-formulated evaluation questions also ensure that findings will be useful, relevant, and aligned with stakeholder expectations.

Evaluation questions should be:

- Aligned with the **purpose and objectives** of the evaluation
- Focused on specific areas of inquiry (e.g. outcomes, relevance, inclusion)
- Open-ended and neutral (not leading or yes/no)
- Aligned where possible with the **OECD-DAC evaluation criteria**:
  - **Relevance** – Is the project addressing the right issues in the right way?
  - **Effectiveness** – Is the project achieving its intended outcomes?
  - **Efficiency** – Are resources being used economically?
  - **Impact** – What broader changes are being achieved?
  - **Sustainability** – Will the benefits continue after the project ends?

Depending on the evaluation type (e.g. mid-term vs final), the scope may also include cross-cutting themes such as **gender, disability inclusion, child safeguarding, or partnership quality**.

### Tips for Writing Strong Evaluation Questions

- Use **no more than 5–6 core questions** to keep the evaluation manageable and focused.
- Write questions that are **exploratory**, not confirmatory. Instead of “Did the project succeed?”, ask “To what extent did the project achieve its intended outcomes?”
- Group questions under relevant headings (e.g. Effectiveness, Inclusion) if the evaluation is large or thematic.
- Avoid overly technical language. Make questions accessible for all stakeholders, including community members.
- Ensure **data availability**—only ask questions for which evidence can reasonably be gathered.

## Examples of Key Evaluation Questions

### 1. Effectiveness

- To what extent did the project achieve its intended outcomes in improving women's income and decision-making power?
- What key factors contributed to or hindered achievement of results?

### 2. Relevance

- How well did the project's activities and strategies respond to the needs and priorities of displaced communities?

### 3. Sustainability

- Are project participants likely to sustain the skills, businesses, or leadership roles gained through the project?
- What mechanisms (formal or informal) exist to continue the benefits?

### 4. Efficiency

- Were resources—financial, human, and material—used in an efficient manner? Could similar results have been achieved with fewer inputs?

### 5. Inclusion and Participation

- How inclusive was the project's implementation? Did women, persons with disabilities, or other marginalised groups face any barriers to participation?

### 6. Learning and Adaptation

- What lessons can be drawn from the implementation process that should inform future programming?

## 5. Scope of the Evaluation

### Guideline

The scope defines the **boundaries and limits** of the evaluation. It tells the evaluator exactly **what is to be assessed and what is not**, preventing ambiguity and scope creep. This section also helps stakeholders understand which program components, time periods, and locations will be covered, and which specific themes or target groups are of focus.

The scope should define:

- The **timeframe** the evaluation will cover (e.g. whole project or a specific phase)
- The **geographic coverage** (e.g. townships, villages, camps)
- The **project components** or themes to be evaluated (e.g. training, protection, gender, health)
- The **stakeholders or groups** to be consulted (e.g. women participants, local partners, volunteers)
- Any **limitations** or areas that are **excluded** from the evaluation

This section ensures that the evaluation is **realistic, focused, and achievable** within the available resources, time, and access constraints.

### Tips for Writing the Scope

- Make it **explicit**: say exactly what will and will not be covered.
- Use bullet points for clarity if there are multiple components or locations.
- If the project was implemented in **phases**, specify whether all phases are included.
- If any population group or activity is **excluded**, explain why (e.g. security, timing, funding limits).
- Cross-reference with the **evaluation questions** to ensure alignment.

### Example: Scope of the Evaluation

The evaluation will cover the full implementation period of the Women's Livelihoods Empowerment Project, from January 2022 to December 2024.

#### Geographic Scope:

- 12 villages in Hpa-An and Kawkareik townships, Kayin State, Myanmar

#### Thematic Areas to be Evaluated:

- Vocational skills training
- Small business grant support
- Community mentorship and women's leadership development
- Safeguarding awareness and gender inclusion strategies

#### Stakeholders to be Consulted:

- Female project participants
- Local implementing partners and trainers
- Community leaders and committee members
- BCDC staff and volunteers

#### Exclusions:

- The project's emergency COVID-19 relief activities (conducted in mid-2022) will not be assessed as they fall outside the core program logic.

## 6. Evaluation Methodology

### Guideline

This section outlines the **approach and methods** that the evaluator is expected to use—or propose—for conducting the evaluation. While the evaluator typically finalizes the methodology during the inception phase, the ToR must provide clear expectations regarding the **minimum standards, ethical requirements, and participatory principles** BCDC adheres to.

It should include:

- The **overall approach** (e.g. qualitative, quantitative, or mixed-methods)
- Requirements for **participatory methods** and inclusion of marginalized groups
- Types of **primary and secondary data** expected
- **Sampling strategy** (e.g. purposive, random, stratified)
- Use of **baseline or comparison data** (if available)
- Consideration of **safeguarding, consent, and ethical review**
- Guidelines on **data analysis**, triangulation, and validation

This section should be flexible enough to allow evaluators to refine or innovate within ethical and contextual parameters, while still being specific about what BCDC expects.

### Tips for Writing the Methodology Section

- Use clear language even when referencing technical standards—remember, the ToR may be reviewed by community representatives.
- Emphasise BCDC’s **non-negotiables**, such as participatory engagement and safeguarding.
- Don’t over-specify—provide structure and direction, but allow the evaluator to propose adaptations in the Inception Report.
- If digital data collection or remote methods are allowed or required, say so explicitly.
- If access to communities is restricted due to conflict or displacement, note the need for flexible or proxy approaches.

### **Example: Evaluation Methodology**

The evaluation is expected to use a **mixed-methods approach**, combining both qualitative and quantitative data to ensure rigor and depth of insight. Participatory methods must be used to meaningfully involve primary stakeholders—particularly women, youth, and persons with disabilities.

Key expectations include:

- **Primary data collection** through individual interviews, focus group discussions (FGDs), and observation. Gender-segregated FGDs are encouraged.
- **Secondary data review** of project reports, training materials, financial summaries, and monitoring data.
- **Sampling strategy** must ensure inclusion of diverse participants across the 12 target villages and reflect different age, gender, and disability groups.
- If face-to-face data collection is not feasible in some locations due to security or displacement, alternative approaches (e.g. phone interviews or local enumerators) must be used with BCDC’s guidance.
- Evaluation tools (e.g. interview guides, surveys) must be validated with BCDC and translated into local languages as required.
- All evaluation activities must follow BCDC’s Safeguarding Policy, ensure informed consent, and minimise harm or risk to participants.

The evaluator will submit a detailed methodology and data collection plan in the **Inception Report**, which must be reviewed and approved before fieldwork begins.

## 7. Deliverables and Timeline

### Guideline

This section clearly outlines the **expected outputs** (deliverables) of the evaluation and sets a **timeline** for each milestone. It ensures that the evaluator understands what needs to be produced, in what format, and by what date—allowing both parties to manage the process smoothly.

Deliverables should be **specific, tangible, and reviewable**, and timelines should be **realistic** given the scope of work and any field or travel constraints.

Key deliverables typically include:

- **Inception Report** (including methodology, sampling plan, tools, and work schedule)
- **Draft Evaluation Report**
- **Final Evaluation Report**
- **Presentation or Validation Workshop**
- **Summary brief** or infographic (optional, for community or donor use)
- **Raw data files** or documentation (if required and appropriate)

The timeline must include:

- Start and end dates of the evaluation
- Key phases: document review, data collection, analysis, reporting
- Review periods for BCDC or stakeholder feedback

### Tips for Setting Deliverables and Timelines

- Always include the **Inception Report** as a non-negotiable deliverable.
- Allow for **at least 5 working days** between each review and feedback round.
- Use a **table format** to present dates, deliverables, and responsible persons clearly.
- Account for **local holidays, travel disruptions, or security risks** that may affect timing.
- If community presentations or validation workshops are required, specify who will facilitate and whether translation will be needed.
- If data security or anonymization is required before sharing raw files, say so.

### Example: Deliverables and Timeline

Deliverable	Description	Due Date	Responsible
<b>Inception Report</b>	Methodology, sampling plan, tools, ethics protocol	15 March 2025	Evaluator
<b>Draft Evaluation Report</b>	Full draft for internal and partner review	5 April 2025	Evaluator
<b>Stakeholder Validation Workshop</b>	Present findings and collect feedback from partners and participants	10 April 2025	BCDC + Evaluator
<b>Final Evaluation Report</b>	Revised report incorporating stakeholder feedback	18 April 2025	Evaluator
<b>Summary Brief (2 pages)</b>	Plain-language summary for community/donor use	22 April 2025	Evaluator
<b>Submission of Tools and Datasets</b>	Cleaned data, signed consent logs, photos (if permitted)	24 April 2025	Evaluator

**Note:** All reports must be submitted in Word and PDF formats. Data files must be stored securely and anonymised before sharing. All findings remain the intellectual property of BCDC unless otherwise agreed in writing.

## 8. Roles and Responsibilities

### Guideline

This section defines the roles of the **evaluator** and the **BCDC team**, as well as any **partners or stakeholders** involved in the evaluation. It ensures that everyone knows who is responsible for what—before, during, and after the evaluation process.

Clearly outlining roles:

- Prevents misunderstandings
- Ensures timely delivery of outputs
- Promotes shared accountability
- Clarifies who provides access, support, or decision-making authority

Key categories of responsibility include:

- **Coordination and oversight**
- **Technical support and document access**
- **Logistics and community liaison**
- **Safeguarding and ethical compliance**
- **Translation, facilitation, and interpretation**
- **Review and approval of deliverables**

#### Tips for Defining Roles and Responsibilities

- Use **specific job titles** or team roles (e.g. “Project Manager”, not just “staff”).
- If multiple BCDC staff are involved, **clarify their roles** in relation to the evaluator (e.g. one may manage logistics, another leads review).
- If partner organizations or community focal points are supporting the evaluation, list their expected contributions.
- Indicate **who is the evaluator’s primary point of contact**.
- Reiterate who is responsible for ensuring **ethical and safeguarding compliance**.

### Example: Roles and Responsibilities

Role	Responsibility	Name / Position
<b>Evaluator / Evaluation Team</b>	Lead evaluation design, data collection, analysis, and reporting; ensure data integrity and safeguarding compliance; deliver all outputs according to ToR.	
<b>BCDC Project Manager</b>	Main liaison with evaluator; provide project documents; coordinate staff input; oversee ToR compliance.	
<b>BCDC M&amp;E Focal Point</b>	Provide technical review of evaluation tools; ensure methodology aligns with BCDC PMEL standards; participate in reflection session.	
<b>BCDC Field Officer</b>	Coordinate site visits, arrange community meetings and interviews, facilitate access to beneficiaries, and assist with translation.	
<b>Safeguarding Officer</b>	Ensure consent protocols and data protection guidelines are followed; provide incident response support if needed.	
<b>Partner Organization (KWDN)</b>	Support community outreach, venue coordination, and co-facilitate validation session with women participants.	

**Note:** The evaluator must regularly communicate progress and challenges with the BCDC Project Manager and copy the M&E Focal Point on all major correspondence.

## 9. Ethical and Safeguarding Considerations

### Guideline

This section outlines the **ethical principles, data protection standards, and safeguarding requirements** that evaluators must follow when conducting fieldwork, collecting data, and reporting findings.

Evaluations conducted or commissioned by BCDC must be:

- Respectful of local culture and norms
- Conducted with **informed and voluntary consent**
- Designed to **do no harm**
- Inclusive and safe for all participants, especially **children, women, persons with disabilities, and people at risk of exploitation or violence**

The ToR must require all evaluators—internal or external—to:

- Comply with BCDC’s **Child Safeguarding Policy, PSEAH Policy, and Code of Conduct**
- Adhere to ethical standards in research and evaluation (e.g. confidentiality, anonymity, respect)
- Take responsibility for managing **risk and disclosure** (e.g. if a participant reports abuse or distress)
- Use data storage and transfer practices that **protect personal information**

The evaluator may also be asked to **sign a Safeguarding Declaration** and **complete induction or briefings** from BCDC before beginning fieldwork.

### Tips for Writing This Section

- Always refer to **specific BCDC policies** (not just general ethics).
- Include expectations for **informed consent**, including child/youth assent and caregiver consent where applicable.
- Mention **data security**: who owns the data, where it is stored, and how it will be protected.
- Clarify whether evaluators will receive **safeguarding training or briefings**.
- Indicate how safeguarding **breaches or incidents** should be reported.

### **Example: Ethical and Safeguarding Requirements**

The evaluation must be conducted in full compliance with BCDC's:

- Child Safeguarding Policy
- Prevention of Sexual Exploitation, Abuse and Harassment (PSEAH) Policy
- Code of Conduct

The evaluator is responsible for:

- Ensuring **informed consent** is obtained from all participants prior to interviews or data collection. For children and youth under 18, consent must be obtained from a caregiver and assent from the child.
- Providing a simple explanation (in local language) of the purpose, risks, and confidentiality terms of the evaluation.
- Guaranteeing **voluntary participation** and the right to withdraw at any time.
- Protecting the **privacy and anonymity** of all participants, especially when using quotes, case studies, or photographs.
- Using **secure methods** for storing and transferring data (e.g. password-protected files, encrypted drives).
- Reporting any **safeguarding concerns or disclosures** to BCDC's Safeguarding Officer within 24 hours.
- Signing BCDC's **Safeguarding Compliance Declaration** prior to beginning fieldwork.

Where appropriate, BCDC will provide evaluators with a **briefing on cultural context and safeguarding expectations**, and facilitate introductions with local community leaders or focal persons.

## 10. Budget (if applicable)

### Guideline

This section outlines the **available budget** or the **expected costing format** for the evaluation. It may provide either:

- A **fixed total budget**, within which all costs must be covered, or
- A request for the evaluator to **propose a detailed cost estimate**, often itemized by deliverable or number of days.

The budget should consider:

- Professional fees (daily or lump sum)
- Travel and accommodation (if applicable)
- Translation or interpretation services
- Workshop or validation meeting costs
- Report production and data management
- Taxes, insurances, or consultancy registration costs (if required)

If the budget is not final or not shared in the ToR, the section should still **instruct the evaluator to submit a budget proposal** and clarify what should be included.

### Tips for Writing the Budget Section

- If the budget is fixed (e.g. funded by a donor), say so clearly and specify what is **included or excluded**.
- If flexible, request that evaluators submit an **itemized cost estimate**, not just a lump sum.
- Indicate **preferred payment terms** and currency (e.g. AUD or USD).
- If international consultants are involved, clarify whether **travel and visa costs** are reimbursable.
- Mention whether taxes (GST or withholding tax) are **inclusive or to be added**.

### **Example: Budget (Fixed Fee Model)**

The total budget available for this evaluation is **AUD 9,000 (inclusive of taxes and all expenses)**.

This must cover:

- Professional fees for up to 20 working days
- Travel to Kayin State (if travel is permitted)
- Per diem and accommodation (if overnight stays are required)
- Local enumerator or interpreter costs (if needed)
- Preparation and printing of community-friendly versions of findings
- Data security and storage

BCDC will not provide separate reimbursement for additional expenses. All costs must be included in the total proposed fee. Payments will be made in three instalments:

- 30% upon signing of contract
- 30% upon submission of the draft report
- 40% upon acceptance of the final report

### **Example: Budget Request (If Budget is Flexible or Negotiated)**

The evaluator is requested to submit a **detailed financial proposal** as part of the application, including:

- Daily professional fee
- Estimated number of working days (for design, fieldwork, reporting)
- Travel and accommodation costs
- Support costs (e.g. translation, enumerators, software)
- Applicable taxes and other fees

BCDC prefers to work in **AUD** but may accept proposals in USD depending on context. Proposed budgets will be assessed based on **value for money, transparency, and completeness**.

## 11. Reference Documents and Contacts

### Guideline

This section provides the evaluator with **key documents** and **primary contacts** that will inform their understanding of the program, BCDC's policies, and the evaluation requirements. It ensures they have the necessary material to prepare their methodology, tools, and inception report, and to align their approach with BCDC's values and expectations.

**Reference documents** may include:

- Project design documents (proposals, results frameworks, log frames)
- Progress and monitoring reports
- Baseline or midline studies (if applicable)
- Strategic plans
- Relevant organisational policies (e.g. safeguarding, inclusion)
- Donor reporting templates or guidance (if evaluation is donor-mandated)

**Contact persons** should include:

- The primary BCDC contact for evaluation management
- M&E focal point for technical support
- Field contact for local coordination
- Safeguarding focal point (if fieldwork is involved)

### Tips for Completing This Section

- Only list documents that are **final, approved, and relevant** to the evaluation scope.
- Share documents in **editable and accessible formats** (Word, PDF, Excel).
- Be clear about who owns the data and reports, and what can be shared externally.
- Provide **both email and phone contact** (or secure messaging apps if used in the field).
- If field sites are insecure or access-limited, include contacts for **community focal points or local partners**.

### Example: Reference Documents and Contacts

#### Key Reference Documents to Be Provided:

- Project Proposal and Logical Framework (WLEP - Version approved Feb 2022)
- Baseline Report - “Women and Livelihoods in Kawkareik Township” (BCDC, 2021)
- Quarterly Progress Reports (Jan 2022 - Dec 2024)
- Final Budget Summary and Activity Implementation Tracker
- BCDC Strategic Plan 2024-2027
- BCDC Child Safeguarding Policy (2023)
- BCDC Code of Conduct and Evaluation Ethics Guidelines (2023)
- XYZ Foundation Evaluation Guidance Note (Donor Requirements)

All documents will be shared electronically through a secure cloud link or via email upon evaluator onboarding.

#### Key Contacts:

Role	Name	Email	Phone / WhatsApp
<b>Evaluation Focal Point</b>	U _____ (M&E Lead)	mne@bcdc.org.au	+95 9 000 00 1234
<b>Evaluation Contract Manager</b>	Daw _____ (Project Manager)	myat.moe@bcdc.org.au	+95 9 8888 4567
<b>Field Access Coordinator</b>	Naw _____ (_____ Officer)	naw.pae@bcdc.org.au	+95 9 9999 5432

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