



## **Cultivating our MEAL systems:**

*Insights from the 2025 Global Holistic MEAL Symposium*



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# Cultivating our MEAL systems: Insights from the 2025 Global Holistic MEAL Symposium

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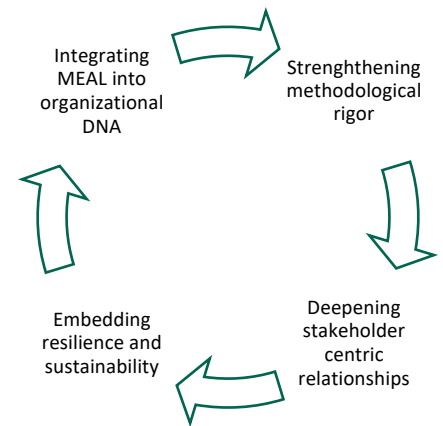
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## Executive Summary

This whitepaper documents the insights and evidence-based best practices identified during the 2025 Global Holistic MEAL Symposium. These insights enable non-governmental organization (NGO) executives and Monitoring, Evaluation, Accountability, and Learning (MEAL) practitioners to adopt proven practices that strengthen holistic MEAL systems. A learning culture flourishes when MEAL is framed as improvement-oriented rather than a policing function. The focus is on actionable standards—credible evidence generation, systematic learning loops, and transparent accountability—that can be tailored to diverse operational contexts.



### Four priority areas and identified themes

#### 1. Integrating MEAL into Organizational DNA

Making MEAL integral to an NGO's "DNA" begins with integration into core structures, culture, and strategic vision. It requires codifying MEAL practices in governance documents, job descriptions and strategic plans. By anchoring roles to a shared Theory of Change and engaging regular, participatory reflection, leadership signals that learning is a core performance expectation, not a compliance add-on. Such structural embedding enables timely, two-way information flows that turn data into adaptive decision-making and strengthen institutional credibility with donors and communities. A learning culture built on reflections and celebration of milestones shifts the organizational ethos from compliance to continuous improvement.

Symposium participants emphasized that ambitions for rigorous, learning-oriented MEAL collapse without predictable finance. The paper therefore recommends safeguarding sufficient budget for evidence generation, noting that this figure usually covers software, field activities and external studies but rarely staff time. When personnel costs are included, allocations must rise or be explicitly detailed. Transparent cost lines and multi-year commitments help prevent staffing gaps, sustain data pipelines and demonstrate that organizations "put their money where their mission is."

Participants prioritized collaborative approaches with universities and technology providers to address organizational capacity gaps rather than attempting independent development of specialized capabilities. It also adds accountability while fostering cross-sector learning and knowledge transfer.

## 2. Strengthening Methodological Rigor

Methodological rigor ensures that MEAL systems generate both credible evidence and actionable insights, balancing technical depth with practical feasibility in resource-constrained contexts. To generate this evidence, the whitepaper calls for harmonized indicator sets that have been created in participatory consultation with stakeholders who are linked to the Theory of Change, balancing quantitative reach with qualitative depth, and clear data-quality protocols.

Symposium participants prioritized integrating quantitative methodologies with qualitative methodologies to capture intangible outcomes that quantitative tools frequently overlook. This methodological integration addresses limitations inherent in purely quantitative frameworks that may document statistical changes without providing explanatory context or capturing transformative experiences that define holistic development outcomes.

The priority of simplifying actionable indicators addresses persistent challenges organizations face when attempting to implement complex measurement frameworks within challenging operational environments. Simplified metrics also improve stakeholder comprehension and engagement by presenting information in formats that diverse audiences can interpret and utilize for decision-making purposes.

Participants prioritized establishing comprehensive ethical frameworks governing data collection, analysis, and dissemination practices to mitigate community mistrust and prevent donor overreach in measurement activities. These protocols address growing concerns regarding artificial intelligence applications in development contexts while ensuring appropriate consent validation and data anonymization procedures.

## 3. Deepening Stakeholder-Centric Relationships

Stakeholder-centric MEAL systems reposition communities and donors as active partners rather than passive givers and receivers. The priority of building sustained relationships over transactional interactions addresses fundamental power dynamics that can undermine data quality and community ownership of MEAL processes. Moving beyond extractive data practices, the paper advocates for participatory co-creation of the MEAL process and the use of feedback loops that return findings to communities in accessible formats and invite interpretation from those most affected. Designing MEAL systems that facilitate ongoing dialogue rather than producing isolated reports fosters trust with both communities and funding partners. Effective systems enable regular communication cycles that keep donors engaged with programmatic development while providing opportunities for strategic input and collaborative adjustment throughout implementation processes. Stakeholder-centric systems foster trust, surface

context-specific insights and ensure that program adaptations are co-owned, thereby deepening engagement, accountability, and efficacy of outcomes.

#### 4. Embedding Resilience and Sustainability

MEAL systems must withstand staff turnover, funding shocks and contextual volatility. Embedding resilience and sustainability into MEAL practice calls for an architectural shift from isolated tools and ad-hoc procedures toward an integrated system that can withstand personnel transitions, resource fluctuations, and external shocks without eroding data integrity or learning momentum. Practices discussed for maintaining organizational momentum include 1) institutionalizing succession mechanisms that safeguard hard-won knowledge and narrative assets when staff depart and 2) leveraging cross-sector collaboration. Resilient MEAL systems operate within trust-based frameworks for shared learning and authentic accountability. This creates opportunities for more sustainable partnerships with a diverse group of funders while enhancing the credibility and utility of impact measurement.

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## Introduction — Aligning Mission with Holistic MEAL

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This whitepaper provides practical insights for a diverse audience, ranging from all levels of NGO staff, from implementing officers to executives, MEAL specialists and external consultants, academic researchers and funders who aim to advance holistic MEAL design and implementation. This publication is a collaborative effort by the delegates of the 2025 Global Holistic MEAL Symposium held in Chiang Mai, Thailand, jointly convened by ECHO and Management Analytics.

### Symposium Snapshot

**Event:** Global Holistic MEAL Symposium

**Dates:** July 7-9, 2025

**Location:** Chiang Mai, Thailand

**Participants:** 30 attendees, including NGO executives, directors, MEAL practitioners, fundraisers, funders, and academics representing universities and faith-based organizations across Africa, Asia, Europe, Latin America, and North America

**Convenor:** ECHO at the [ECHO Asia Impact Center and Small Farm Resource Center](#)

**Methodology:** Case-study exchanges, facilitated writing charrettes on best practices, a structured survey completed by symposium attendees, and discussions synthesizing contextualized priorities and insights

According to the participant discussions, each component of MEAL serves a unique organizational function requiring specialized approaches and resource allocations. Holistic MEAL systems must serve internal learning and external accountability functions simultaneously rather than focusing exclusively on donor reporting requirements. Internal learning applications enable organizations to adapt programming based on systematic feedback while building organizational culture that prioritizes continuous improvement and evidence-informed decision making. This can be summarized in four key strategic outcomes:

- Strengthened learning culture
- Deeper stakeholder engagement
- More robust internal monitoring
- Enhanced donor reporting

**Monitoring** activities focus on accountability for activity completion through systematic tracking of output indicators such as training participant counts, resource distribution records, and service delivery documentation. These activities ensure organizations fulfill stated commitments while providing foundational data for subsequent evaluation and learning processes.

**Evaluation** activities emphasize contribution to outcomes through sophisticated analysis techniques, including randomized controlled trials, remote sensing analysis, use of counterfactuals, difference-in-differences, and comparison group methodologies. These approaches determine causal relationships between organizational activities and observed changes, enabling evidence-based claims regarding program effectiveness and impact.

**Accountability** is integral to stewarding resources responsibly. When MEAL is embedded in an organization’s mission and operating model, every program decision, budget allocation, and partner dialogue becomes an opportunity for continuous improvement and shared accountability.

**Learning** prioritizes adaptive adjustments through participatory story testing, reflection processes, and collaborative analysis that inform program modification and strategic adaptation. These activities emphasize improvement and innovation rather than accountability, fostering organizational development and community engagement through collaborative inquiry processes.

## Section Architecture at a Glance

The whitepaper’s four thematic sections share a four-part structure that allows rapid navigation:

Block	Focus
Narrative Overview	Situates the theme in the broader MEAL landscape and explains its strategic importance.
Participant-Identified Priorities	Issues that symposium practitioners ranked as most urgent in relation to implementation, ownership and culture.
Complementary Insights	Additional, nuancing perspectives on the main theme or the identified priorities.
Case Study Insights	Themes, challenges and barriers, and lessons learned and recommendations from case-study exchanges from affiliations present.

## Integrating MEAL in Organizational DNA

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Embedding MEAL within an NGO's organizational DNA begins with integration into core structures, culture, and strategic vision. In this group, a faith-centered identity anchors MEAL in Biblical stewardship, while a robust Theory of Change aligns holistic metrics with mission goals. Strategic resourcing and budgeting are vital for sustainable MEAL systems. Clear role definitions ensure accountability without overburdening staff. Strategic partnerships with universities and technology providers enhances analytical capacity. A learning culture built on reflections and celebration of milestones shifts the organizational ethos from compliance to continuous improvement.

### Participant-Identified Priorities

#### Faith-Centered Identity

Symposium participants emphasized embedding principles prioritized by faith-based organizations such as stewardship, partnership, and dignity into metrics and reporting frameworks. Holistic metrics recognize the interconnected and interdependent nature of human development, viewing individuals as connected to God, creation, one another, and human systems as fully integrated spiritual, physical, emotional, social, and economic beings. The faith-centered approach transcends traditional evaluation methodologies by establishing transformative foundations that honor communities' inherent agency and capacity to define success. Co-creation of metrics development in a participatory manner is one approach that can embrace locally relevant indicators.

#### Theory of Change Foundation

Participants emphasized using ToCs as the structural backbone for MEAL design, aligning metrics with strategic objectives such as poverty reduction, hunger alleviation, and livelihoods improvement. This priority prevents ad hoc indicator selection during project planning by providing consistent reference points throughout project lifecycles. A strategic plan, when aligned to a ToC, serves as the organizing framework that clarifies organizational objectives while guiding metric selection processes, ensuring all MEAL activities maintain alignment with organizational strategy and mission-driven outcomes.

#### Learning Culture Supporting Adaptive Management Practices

Participants prioritized institutionalizing learning-oriented approaches that emphasize adaptation and improvement for missional success rather than compliance and control. Participants emphasized that MEAL outcomes must inform current and future programming and organizational strategies rather than merely fulfilling reporting requirements. This focus cultivates intrinsic staff motivation through demonstrated relationships between measurement activities and institutional purpose. This cultural transformation requires reflection processes and feedback environments that reduce staff apprehension regarding corrective interventions while enhancing organizational adaptability. The paradigmatic shift toward "learning over

## Cultivating our MEAL systems: Insights from the 2025 Global Holistic MEAL Symposium

policing" encourages transparency while reducing defensive behaviors that compromise data quality and organizational learning. Siloed MEAL approaches in growing teams received particular attention, with participants noting that departmental boundaries can fragment MEAL understanding and implementation effectiveness. The end result should focus on organizational efficacy and missional success that is informed by MEAL to constantly adapt and pivot to changing realities.

### Role Clarity and Capacity Strengthening

The priority of defining MEAL responsibilities within job descriptions emerged as essential for avoiding role ambiguity and staff overburdening. Participants recognized that resource-constrained organizations frequently require MEAL duty integration within existing roles, while adequately funded projects may support dedicated MEAL personnel. The point was made that MEAL staff are a bridge between organizational efficacy and advancement (fundraising and storytelling) functions and therefore should reside somewhere at the confluence of both. Participants stressed the need to strategically place this role and think deeply about reporting lines within organizations. This strategic balance between specialized and distributed responsibilities prevents implementation gaps while ensuring appropriate attention to MEAL activities despite competing organizational priorities.

Capacity strengthening efforts should adopt modular curricula that blend short in-person intensives with ongoing remote coaching, reinforce learning through regional peer networks, and elevate designated "MEAL champions" who sustain momentum between formal trainings. Hands-on mentoring, whether delivered through scheduled support visits or immersive workshops, consistently deepens skill uptake and embeds MEAL responsibilities across diverse roles.

Participants recognized that effective capacity strengthening must account for significant variations in organizational MEAL maturity and resources. Organizations must realistically assess their current MEAL capacity to determine appropriate investment strategies and funding requests. Emerging organizations benefit from foundational investments in basic monitoring systems and training infrastructure, while organizations with more advanced MEAL systems require sophisticated analytical platforms and specialized methodological support. This differentiated approach acknowledges that many organizations lack dedicated MEAL staff, necessitating strategic investment in foundational capacity building infrastructure that can evolve as organizational systems mature. By aligning capacity investments with realistic organizational contexts, institutions can build sustainable MEAL functions without overextending limited resources.

### Realistic Allocation

Participants emphasized that organizations must align financial commitments with MEAL aspirations, stating that sustainable resourcing represents essential infrastructure rather than optional enhancement with one participant noting that "you have to put your money where your mission is". Symposium participants advocated for realistic MEAL budget allocations of 5-

10 percent of program budgets. When skilled labor costs for specialists and subject matter experts are included, budget allocations must increase substantially or receive a clear definition within funding proposals and organizational planning processes to distinguish between temporary technical support and permanent staffing requirements.

### Partnership Leverage

Participants prioritized collaborative approaches with universities and technology providers to address organizational capacity gaps rather than attempting independent development of specialized capabilities. It also adds accountability while fostering cross-sector learning and knowledge transfer. University partnerships offer a particular value for methodological training, research design consultation, and academic validation of MEAL approaches. Technology provider collaborations enable access to sophisticated platforms, data management systems, and analytical tools that exceed individual organizational development capacity. At the same time, partnerships gain traction when goals, roles, and timelines are co-defined from the outset and translated into plain-language visuals, concise graphic briefs, intuitive dashboards, and story-infused summaries, that accommodate the full spectrum of data-literacy levels found among donors, project site teams, and community members. These partnerships should not be assumed to be the most cost-effective solution to capacity constraints as a necessary organizational layer must be well considered at the start of an engagement. Collaboration frameworks benefit from early, written agreements that set shared objectives, clarify data-sharing norms, and outline dispute-resolution paths; rotating facilitation of reflection sessions helps equalize voice and accountability.

## Complementary Insights

### Budget Boundary Clarification

Beyond the identified priorities, symposium participants emphasized the critical importance of explicit budget boundary definitions that eliminate confusion regarding included versus excluded costs. Organizations must develop standardized approaches to MEAL budget categorization that distinguish between direct activity costs, indirect support expenses, and human resource investments.

Direct activity costs typically encompass software subscriptions, data collection tools, training workshops, and external consultation services. Indirect support expenses include administrative overhead, communication costs, and facility usage for MEAL-related activities. Human resource investments represent the most significant cost category, including dedicated MEAL staff salaries, training time for existing personnel, and capacity-building initiatives.

### Crisis-Resilient Funding

Symposium discussions emphasized the usefulness of integrating crisis modifiers into budgets to ensure continuity during operational disruptions, including conflicts, pandemics, and natural disasters. Crisis-resilient funding structures enable organizations to maintain core monitoring functions through adapted methodologies and remote data gathering technologies. These

funding provisions address the reality that traditional MEAL approaches often collapse during emergencies when adaptation becomes critical for program survival and beneficiary support. Funders and implementors can jointly pre-determine protocols for budget reallocation, timeline extensions, and alternative data collection methods that maintain system integrity while accommodating operational constraints. Crisis response teams provide specialized support during operational disruptions, ensuring that MEAL activities can continue during conflicts, natural disasters, or other emergencies when traditional data collection approaches become unfeasible. These teams can include existing staffing that receive specialized training to become a crisis-response team when a crisis strikes. Existing staff are already familiar with the context and organization and therefore can maintain stakeholder engagement during challenging periods while adapting measurement approaches to accommodate changing circumstances and priorities.

### Succession Planning

The succession planning approach recognizes that effective knowledge transfer requires proactive preparation rather than reactive responses to staff departures. Organizations must establish systematic procedures for documenting and transferring MEAL knowledge before transitions occur, ensuring that critical information and relationships remain accessible to continuing staff members.

The priority of implementing mandatory MEAL training for onboarding and departing staff alongside systematic archival of qualitative stories with creator details ensures knowledge transfer during staff transitions that commonly disrupt organizational memory and operational continuity. Succession planning addresses the reality that knowledge-intensive activities like MEAL depend heavily on individual expertise that may be lost when key personnel leave organizations.

## Case Study Insights: Balancing Standardization and Contextualization

### Identifying Themes

The conversation centered on the fundamental tension between global metrics and locally relevant measurement approaches. Participants identified the challenge of balancing central, global metrics versus metrics designed for local relevance. A significant theme emerged around addressing the needs of low-literacy communities, where abstract concepts present measurement challenges. The conversation also highlighted difficulties in aggregating data, standardizing indicators, and developing global indicator frameworks across diverse country contexts while maintaining meaningful local relevance.

### Challenges and Barriers

Participants acknowledged several obstacles to balancing standardization with contextualization. Significant challenges emerged in aggregating data and standardizing indicators across diverse country contexts while maintaining meaningful local relevance. Each partner organization often has its own approach to monitoring and evaluation, making standardization difficult. With large networks comprised of thousands of members it is difficult to evaluate the effectiveness of innovations across various cultural and ecological contexts. Resource constraints emerged as a major barrier, with some organizations lacking dedicated staff for monitoring and evaluation, making sustainable implementation of both standardized and contextualized approaches challenging.

### Lessons learned and recommendations

Participants shared that hybrid approaches combining standardized core indicators with locally adapted measures effectively balance consistency and contextual relevance. Visual tools—such as pictorial scales and color-coded dashboards—help bridge comprehension gaps across literacy levels, making data more accessible to communities. Experience showed that communities can co-create culturally appropriate indicators (e.g., school attendance, household meals) while maintaining measurement rigor. Organizations are encouraged to invest in visual communication tools, clearly define ranking levels, and support community-led assessments that preserve local ownership. Strategic sub-sampling, clustering, and spatial analysis further enhance the ability to integrate standardized measurement with contextual depth.

## Strengthening Methodological Rigor

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Methodological rigor ensures that MEAL systems generate both credible evidence and actionable insights, balancing technical depth with practical feasibility in resource-constrained contexts. A mixed-methods design integrates standardized quantitative indicators—such as multidimensional poverty indices—with qualitative narratives capturing community experiences of hope and agency. Simplified metrics reduce data-collection burdens while preserving analytical validity, and ethical data protocols mandate opt-in consent and anonymization to safeguard participant trust. Distinguishing monitoring, evaluation, and learning functions clarifies objectives, while quality-assurance practices—such as narrative validation workflows and cross-team reflection sessions—safeguard data integrity and support robust learning processes.

### Participant-Identified Priorities

#### Mixed-Methods Design

Symposium participants prioritized integrating quantitative methodologies with qualitative methodologies to capture intangible outcomes that quantitative tools frequently overlook. This methodological integration addresses limitations inherent in purely quantitative frameworks that may document statistical changes without providing explanatory context or capturing transformative experiences that define holistic development outcomes.

A mixed-methods approach combines systematic measurement using primary data collection or established poverty indexes such as the United Nations Development Programme (UNDP) multidimensional poverty framework with participatory narrative collection that documents personal transformation stories and collective change processes. Participants emphasized that qualitative storytelling provides essential context for interpreting quantitative trends while offering insights into causal mechanisms that statistical analysis alone cannot reveal, as NGOs operate in a complex system that does not lend itself well for quasi-experimental designs. This integration enables organizations to demonstrate both measurable impact and meaningful change through complementary data sources in a more holistic way.

#### Quality Assurance Considerations

Symposium discussions revealed critical distinctions between different qualitative data types that influence methodological rigor and analytical validity. Participants recognized that while all stories constitute qualitative data, not all qualitative data function as stories. This distinction has important implications for data management and validation processes. When triangulation is done well it enhances MEAL system rigor through appropriate handling of diverse qualitative information types.

Story-based data requires specific validation protocols including originator consent procedures, narrative integrity verification, and contextual accuracy confirmation. These procedures ensure that personal accounts maintain authenticity while respecting participant

agency regarding representation and dissemination. Story validation involves returning draft narratives to originators for approval, modification, or withdrawal prior to external sharing or publication.

Non-story qualitative data, such as focus group transcripts, key participant interview notes, and observational records, require different validation approaches emphasizing accuracy, completeness, and analytical reliability rather than narrative authenticity. These data types benefit from standard qualitative research validation techniques, including member checking, triangulation, and systematic coding procedures.

### Simplified Metrics

The priority of simplifying actionable indicators addresses persistent challenges organizations face when attempting to implement complex measurement frameworks within challenging operational environments. Simplification can happen in 2 ways. Firstly, by re-designing the indicators from a numerical value to a Likert-scale answer options that field staff can collect accurately and reliably while maintaining cross-site comparability and analytical rigor. Another way to implement this approach is by identifying core indicators within larger multidimensional frameworks that capture essential poverty dimensions while remaining accessible to non-specialist staff and community participants. For example, multi-parameter poverty indices may be streamlined to focus on a smaller set of core indicators.

Simplified metrics also improve stakeholder comprehension and engagement by presenting information in formats that diverse audiences can interpret and utilize for decision-making purposes. Dashboard development emerges as a practical implementation strategy that presents and visualizes quantitative indicators alongside impact narratives, creating accessible formats for diverse stakeholder audiences and real-time feedback loops. These integrated presentations enable simultaneous accountability to donors seeking measurable results and community members interested in recognizing their own experiences within documented outcomes, while facilitating internal learning as organizations track their own effectiveness.

The measurement tools discussed at the end of this document offer validated frameworks that organizations can use to develop simplified indicators without compromising accuracy or reliability.

### Cross-Team Reflection Sessions

Methodological rigor extends beyond data collection and analysis to encompass systematic reflection processes that validate findings through collaborative review and interpretation. Cross-team discussion sessions provide opportunities for diverse perspectives to inform data interpretation while identifying potential biases, gaps, or alternative explanations that individual analysts might overlook.

These reflection sessions serve quality assurance functions by subjecting preliminary findings to peer review within organizational contexts while fostering collective ownership of MEAL outcomes and interpretations. Regular reflection processes also contribute to organizational

learning by creating structured opportunities for staff to engage with data implications and consider programmatic adjustments based on emerging evidence.

### Ethical, Privacy, and Security Data Protocols

Participants prioritized establishing comprehensive ethical frameworks governing data collection, analysis, and dissemination practices to mitigate community mistrust and prevent donor overreach in measurement activities. These protocols address growing concerns regarding artificial intelligence applications in development contexts while ensuring appropriate consent validation and data anonymization procedures. These can include Free Prior and Informed Consent (FPIC)<sup>1</sup> and other means such as community-based participatory consent processes that respect Indigenous peoples' rights and good practices for local communities.

Additional safeguards encompass Indigenous data sovereignty frameworks that prioritize community ownership and control throughout the data lifecycle, culturally responsive informed consent protocols that incorporate iterative consultation mechanisms, and specialized considerations for working with Indigenous and local knowledge systems that ensure appropriate attribution and collaborative governance structures.<sup>2</sup>

Consent validation requirements mandate opt-in approval processes for each distinct data analysis purpose rather than blanket consent forms that may not adequately inform participants regarding specific data applications. This approach ensures community members maintain agency regarding their information use while enabling organizations to demonstrate ethical accountability in data management practices.

Data anonymization protocols emerged as fundamental safeguards during symposium discussions, particularly regarding the protection of personally identifiable information including participant names, household locations, and GPS coordinates collected during field assessments. Participants emphasized that systematic anonymization processes must be implemented at the point of data collection rather than as retrospective measures, ensuring that sensitive information remains protected throughout the entire data lifecycle while preserving analytical integrity for cross-site comparisons and longitudinal studies.

Comprehensive data security frameworks require organizations to establish explicit protocols governing artificial intelligence applications, cloud storage systems, and cross-border data transfers that align with both donor requirements and local regulatory environments. The symposium identified particular challenges in balancing transparency obligations to government authorities with data integrity protection, necessitating predetermined guidelines that specify information sharing parameters while maintaining participant confidentiality and organizational accountability standards.

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<sup>1</sup> [Free Prior and Informed Consent – An Indigenous Peoples' right and a good practice for local communities – FAO, United Nations For Indigenous Peoples](#)

<sup>2</sup> [Considerations When Working with Indigenous and Local Knowledge | IPBES ICT guide](#)

These privacy protection measures must be integrated with existing quality assurance mechanisms to create systematic approaches that address both technical rigor and ethical responsibility in MEAL implementation. Organizations should develop data use planning processes that specify access controls, database access, retention schedules, and disposal procedures from project inception, ensuring that privacy considerations inform methodological design decisions rather than constraining data collection activities after implementation begins.

## Complementary Insights

### Operational Ethics

Beyond the identified priorities, participants discussed establishing systematic ethical frameworks and capacity development through biannual audits and version control enforcement to retain institutional knowledge amid staff turnover while ensuring consistent adherence to ethical standards throughout organizational operations. These operational ethics protocols address the tendency for ethical practices to deteriorate during periods of rapid organizational change or resource constraint.

Biannual audit processes provide structured opportunities for organizations to assess their ethical compliance while identifying areas requiring improvement or adjustment. These audits examine consent procedures, data management practices, stakeholder engagement approaches, and reporting accuracy to ensure consistent adherence to established ethical standards. Regular auditing also enables organizations to adapt ethical frameworks based on evolving best practices and changing operational contexts.

Version control enforcement ensures that outdated tools, obsolete procedures, and inappropriate methodologies are systematically retired while current best practices receive consistent implementation across organizational units. This process prevents ethical drift that can occur when different organizational units develop divergent practices or when legacy approaches persist despite improved alternatives becoming available.

### Centralized Data Management

Symposium participants recommended implementing standardized platforms with comprehensive metadata tagging to mitigate tool fragmentation and data redundancy, which frequently undermine organizational effectiveness. Centralized data management addresses the common problem of organizations developing multiple disconnected systems that create inefficiencies, duplication, and knowledge gaps throughout their operational structures.

Standardized platforms provide consistent interfaces and procedures to enable data integration across different program areas and organizational units. These platforms support systematic data collection, storage, and analysis procedures that maintain consistency regardless of staff changes or project transitions. Standardization also facilitates inter-organizational collaboration and comparison by establishing common frameworks that enable knowledge sharing and collective learning.

Metadata tagging requirements ensure that all data entries include essential contextual information, including creator identification, collection dates, geographic locations, and intended audiences. This systematic documentation preserves data provenance and contextual understanding that enables future users to interpret and utilize information appropriately. Comprehensive metadata also supports quality control procedures by enabling systematic review of data sources, collection methods, and validation processes.

The centralized approach reduces tool fragmentation when different organizational units develop independent systems that cannot communicate or integrate effectively. Fragmentation creates inefficiencies, increases training burdens, and prevents systematic analysis across organizational programs. Centralized management can create opportunities for strategic decision-making based on integrated information systems.

## Case Study Insights: Focused Sampling and Visual Feedback Tools

### Identifying Themes

Discussions converged on the value of concentrating data collection in geographic or social clusters where program activity is either most intense or most diverse. Delineating these focal areas through participatory mapping—often along natural or administrative boundaries—allows teams to observe stronger impact signals while respecting local perceptions of community identity. Once defined, simple dashboards that pair numeric scores with intuitive icons translate multi-dimensional findings into formats that frontline staff and community members can interpret with minimal training.

### Challenges and Barriers

Accurately drawing zone boundaries demands nuanced local knowledge; misalignment can invite bias or overlook spillover effects from neighboring areas. Limited connectivity hinders real-time updates, and abstract metrics can alienate low-literacy users when visual support is lacking. In comparison areas, residents may perceive exclusion, underscoring the need for transparent communication. Finally, rigorous methods such as difference-in-differences or randomized control trials require well-trained enumerators and consistent protocols, both of which can strain limited MEAL capacity.

### Lessons learned and recommendations

Experience shows that concentrating surveys in well-defined zones can substantially reduce workload without sacrificing analytical power, especially when combined with counterfactual sites and using difference-in-differences techniques for comparison. Co-create explicit criteria for zone selection that blend program records with community insights, then validate boundaries through ground-truthing before data collection begins. Repeated pre-intervention rounds capture seasonal and external fluctuations

that single baselines overlook, sharpening attribution. Where internet access is sporadic, deploy offline-capable dashboards, such as laminated heat maps or tablet apps that sync when online (e.g. Kobo Collect), to keep feedback cycles intact. Triangulating household surveys, geospatial layers and community-led assessments enrich interpretation, while story cards embedded in the dashboard help audiences connect aggregate trends to lived realities. Pair quantitative panels with concise narratives vetted by participants to sustain engagement across literacy levels. Finally, monitor adjacent communities for spillover and integrate statistical controls that isolate program effects from wider context dynamics.

## Case Study Insights: Networked Spatial Analysis Stress-Test

### Identifying Themes

Participants examined how spatially anchored measurements, such as using watershed, administrative, or ecological boundaries and boundary conditions, can reveal the resilience of MEAL systems when routine data flows are disrupted. By pairing geospatial layers with household and community surveys, the conversation framed each field site as a “node” whose performance under stress conditions helps expose which parts of the monitoring network are indispensable for maintaining analytical continuity.

### Challenges and Barriers

The exercise underscored recurring obstacles: resistance of those in comparison areas to continued sampling once they realized they would not receive the intervention; limited connectivity in conflict-affected zones delayed data uploads and hindered real-time validation; and enumerator teams needed heightened security awareness and cultural fluency to operate where movement restrictions or mistrust could interrupt planned surveys.

### Lessons Learned and Recommendations

Participants advocated establishing baseline measurements in both treatment and control sampling areas before any intervention begins, then scheduling follow-up rounds that blend satellite imagery with locally gathered data, when possible, to keep monitoring viable when access tightens. They urged modular field protocols that let secondary teams assume responsibility if a primary node fails, alongside targeted training that equips enumerators to manage security, ethics, and technical troubleshooting in volatile environments.

Experience showed that choosing natural boundaries (e.g. watershed) or political boundaries (e.g. districts) grounded in local realities clarifies attribution, especially when difference-in-differences techniques compare intervention areas with untreated counterparts. Integrating remote sensing, participatory workshops, and on-the-ground enumerator visits provided a fuller picture of environmental shifts, livelihood patterns, and program influence, while also validating findings across multiple data streams.

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## Deepening Stakeholder-Centric Relationships

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Stakeholder-centric MEAL systems reposition communities and donors as active partners rather than passive givers and receivers. The priority of building sustained relationships over transactional interactions addresses fundamental power dynamics that can undermine data quality and community ownership of MEAL processes. Participants emphasized that authentic trust development requires long-term commitment to community engagement that extends beyond individual project cycles while demonstrating genuine respect for local knowledge and decision-making authority. Inclusive participation engages community leaders in defining success indicators, and deployment of local enumerators mitigates frontline bias. Comprehensive feedback loops demonstrate accountability to both beneficiaries and funders. Trust building through sustained relationships and community-led narrative validation further ensures that MEAL activities honor participant agency, elevate local knowledge, and foster genuine ownership of evaluation results.

### Participant-Identified Priorities

#### Inclusive Design and Contextual Adaptation

Symposium participants prioritized co-creating metrics with communities through collaborative processes that enable local community members to define indicators showing change relevant to their specific contexts. Symposium participants prioritized using participatory appraisals to align metrics with local priorities, avoiding cultural misinterpretation of success criteria through collaborative engagement with community members who possess intimate knowledge of their social, economic, and spiritual contexts. Organizations must invest time and resources in relationship maintenance, recognizing that authentic partnership requires ongoing attention to stakeholder needs and priorities. This priority ensures appropriateness over donor-driven benchmarks by recognizing that external stakeholders may impose measurement frameworks that fail to capture locally significant outcomes or transformation processes.

Inclusive participation requires systematic engagement of community members in indicator development, data interpretation, and outcome validation feedback loops. The co-creation process can involve establishing participatory forums where community representatives collaborate with program staff to identify meaningful measurement approaches. For example, crop yield thresholds may emerge as more relevant wealth indicators than monetary income measures in subsistence agricultural contexts. These locally defined criteria reflect the community's understanding of progress and well-being while maintaining a connection to broader development objectives.

Inclusive design and contextual adaptation extend beyond initial metric design to encompass ongoing data collection and interpretation activities. This adaptation might involve adjusting interview techniques to respect gender roles, modifying survey instruments to accommodate literacy levels, or incorporating traditional storytelling approaches that align with indigenous

knowledge transmission practices. Such adaptations ensure that MEAL activities complement rather than disrupt existing social structures while generating culturally valid information.

### Power-Dynamic Mitigation Through Feedback Loops

The priority of addressing power dynamics within MEAL systems recognizes that traditional evaluation approaches often perpetuate inequitable relationships and extractive, linear communication between donors, implementing organizations, and beneficiary communities. Trust-based engagement involves consistently demonstrating how MEAL findings inform program improvements and organizational learning rather than merely fulfilling external reporting requirements. Communities must observe tangible evidence that their participation in evaluation activities contributes to meaningful programmatic adjustments and enhanced service delivery. This demonstration requires transparent communication regarding evaluation findings, collaborative interpretation of results, and visible implementation of community-recommended improvements.

Participants emphasized deploying local enumerators to reduce frontline bias in data collection while creating more balanced stakeholder relationships throughout the measurement process. Community-based data collectors bring insider knowledge, language skills, and cultural sensitivity that enhance data quality while providing economic opportunities for residents. These arrangements also reduce power disparities by positioning community members as technical experts rather than passive information sources.

Participants prioritized implementing comprehensive feedback mechanisms that demonstrate accountability to both beneficiaries and funders through accessible reporting formats and participatory review processes. The "2-page summary" example emerged as a practical strategy for condensing complex evaluation findings into digestible formats that enable meaningful stakeholder engagement with MEAL outcomes.

Feedback loops require systematic processes for sharing evaluation findings with all stakeholder groups in formats appropriate to their needs and communication preferences. Community feedback sessions after co-creation and validation of indicators and metrics provide opportunities for beneficiaries to review data collection design. Participatory review processes enable collaborative interpretation of evaluation findings while validating preliminary conclusions through stakeholder dialogue. These processes recognize that data interpretation benefits from diverse perspectives and local knowledge that may reveal patterns or explanations invisible to external evaluators. Regular feedback cycles also create opportunities for course correction and program adaptation based on stakeholder input and emerging evidence.

### Community-Led Validation Processes

Symposium participants recognized the critical importance of community-led validation for shared qualitative narratives, ensuring that story-sharing practices uphold ethical standards while honoring participant agency regarding representation and dissemination. Community validation processes require returning draft narratives to originators for review, modification, or

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withdrawal prior to external sharing. A range of well recognized evaluation methodologies such as Outcome Harvesting integrate this in their approach.

These validation procedures recognize that community members possess expertise regarding their own experiences while maintaining authority over how their stories are represented in organizational communications. Validation processes also provide opportunities for clarification, correction, and enhancement that improve narrative accuracy while ensuring cultural appropriateness and contextual sensitivity. These times also provide a space for continuing dialogue about efficacy of interventions, next steps, and lessons learned for greater uptake and success.

Community-led validation extends beyond individual story approval to encompass collective review of evaluation findings and interpretations. Community validation sessions enable stakeholder groups to assess whether external evaluations accurately capture local experiences while identifying gaps, biases, or alternative explanations. Community members must retain authority over how their experiences are represented in organizational communications while contributing to credible evidence that demonstrates programmatic effectiveness.

The emphasis on sustained relationships addresses the tendency for development organizations to engage communities intensively during data collection periods while maintaining minimal contact during analysis and reporting phases. Community members should serve as active partners in monitoring processes, contributing local knowledge and contextual understanding that enhances data quality and relevance. This collaborative approach ensures that MEAL systems remain responsive to evolving community priorities and changing contextual circumstances throughout program implementation.

### Relationship-Centered Rather Than Transactional Engagement with Funding Partners

Besides trust with communities, participants prioritized a similar shift from transactional reporting relationships toward sustained partnership development with funding partners. This approach emphasizes regular dialogue between organizational leadership and donors that extends beyond formal reporting cycles to encompass strategic planning, collaborative problem-solving, and shared reflection on both successes and challenges encountered during implementation.

The relationship-centered approach requires organizations to develop capacity for transparent communication. Authentic partnership enables honest discussion of implementation challenges while creating opportunities for collaborative solutions that benefit both programmatic effectiveness and donor learning. Donors evaluate organizational trustworthiness through cumulative experience rather than individual interactions, creating opportunities for relationship deepening through consistent quality delivery.

This priority involves designing MEAL systems that facilitate ongoing dialogue rather than producing isolated reports. Effective systems enable regular communication cycles that keep

donors engaged with programmatic development while providing opportunities for strategic input and collaborative adjustment throughout implementation processes.

### Effective Donor Engagement

Symposium panelists emphasized that effective donor engagement requires recognizing fundamental differences in donor motivations and corresponding MEAL system responses. The priority involves developing MEAL systems sophisticated enough to serve two types of donors through integrated approaches that combine rigorous data collection with authentic community storytelling.

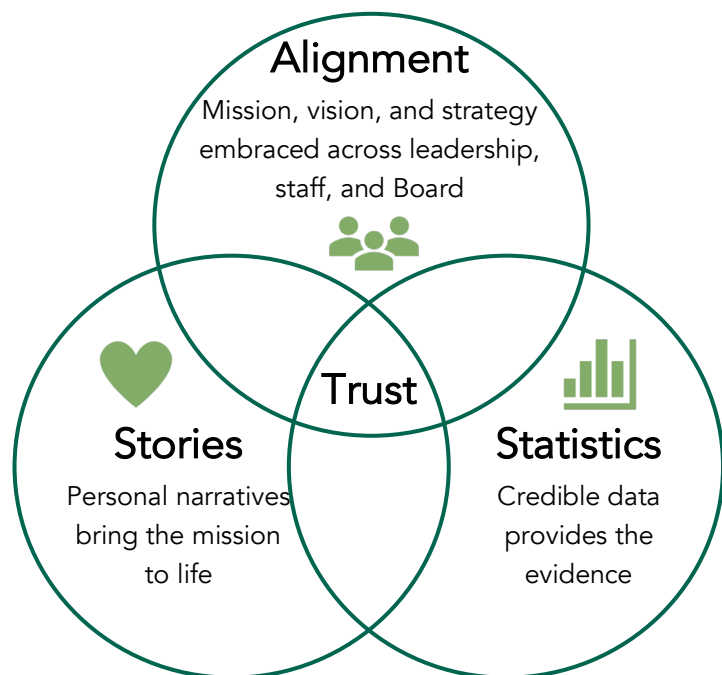
Major donors requiring comprehensive impact evidence demand sophisticated analytical frameworks including detailed evaluation reports and rigorous data analysis that demonstrates measurable return on investment. These seven-figure philanthropists will not engage with narrative content unless credible statistical evidence validates programmatic effectiveness and organizational competence.

Conversely, panelists identified significant donor populations who prioritize authentic storytelling over quantitative analysis. Mid-level donors contributing thousands rather than millions often seek emotional connection through compelling narratives that demonstrate tangible transformation in individual lives and community contexts. For these donors, excessive focus on statistical analysis can diminish rather than enhance engagement by creating emotional distance from the human impact they seek to support.

This illustration shows how trust emerges from the intersection of three critical elements that must function synergistically within resilient MEAL systems.

Organizational alignment ensures coherence between mission, vision, and strategy, creating an authentic foundation for donor engagement. Personal narratives provide compelling evidence that transforms abstract impact metrics into tangible human experiences while honoring community agency. Credible statistics deliver the methodological rigor necessary to validate programmatic effectiveness and enable evidence-based decision making supporting a resilient and sustainable future.

## Building Trust Through Alignment, Storytelling, and Evidence



## Complementary Insights

### Cultural Modifiers for Complex Contexts

Beyond the identified priorities, symposium discussions revealed the critical importance of developing cultural modifiers that enable MEAL adaptation in complex operational environments, including conflict zones, post-disaster settings, and culturally sensitive regions. Cultural modifiers address challenges such as gender restrictions that limit female enumerator access to certain community members, religious considerations that affect data collection timing and approaches, or conflict dynamics that create security concerns for external evaluators. These modifiers provide predetermined protocols for adjusting measurement approaches when standard methodologies become inappropriate or unfeasible due to contextual constraints.

The development of cultural modifiers requires extensive consultation with local cultural experts, religious leaders, and community representatives who can provide guidance regarding appropriate adaptation strategies. These consultations ensure that modifications respect genuine cultural requirements while avoiding insensitivities that might compromise evaluation quality or perpetuate discriminatory practices.

### Dignity-Centered Consent Management

Ethical storytelling practices emerged as a critical consideration requiring systematic protocols for obtaining, managing, and honoring participant consent. These protocols recognize that community members possess expertise regarding their own experiences while maintaining authority over how their stories are represented in organizational communications and external reporting.

Dignity-centered consent management requires returning draft narratives to originators for review, modification, or withdrawal prior to external sharing or publication. This upholds participant agency while preventing misrepresentation, inappropriate exploitation of personal experiences, or privacy and safety concerns for participants.

The implementation of dignity-centered approaches extends beyond individual story approval to encompass collective review of evaluation findings and organizational representations of community experiences. Community validation sessions enable stakeholder groups to assess whether external evaluations accurately capture local experiences while identifying gaps, biases, or alternative explanations that merit consideration in final reporting.

## Case Study Insights: Participatory Ranking Tools

### Identifying Themes

Conversations centered on participatory visual ranking tools that turn intangible ideas, such as wellbeing, cohesion, and dignity, into concrete images placed on cards, scales,

or color-coded boards. As participants grouped and weighted these symbols together, they surfaced shared definitions of progress and verified that proposed indicators resonated with daily experience rather than with externally imposed agendas. The collective sorting process itself became a catalyst for dialogue, revealing which outcomes mattered most to different community groups and clarifying how those priorities should shape future measurement.

### Challenges and Barriers

Effective implementation depends on deliberate facilitation that amplifies quieter voices and prevents more assertive individuals or community leaders/other power actors from steering the exercise. Crafting culturally appropriate artwork takes time and collaboration with local creatives, and the simplicity of images can mask nuanced concepts if not carefully vetted. Facilitators require training in equitable dialogue techniques—rotating speaking order, structured turn-taking, and breakout discussions—to ensure balanced participation. Once rankings are complete, translating weighted visuals into digital dashboards can pose technical hurdles, particularly when internet connectivity is unreliable or when software cannot accommodate non-textual data inputs.

### Lessons learned and recommendations

Translating potential indicators into easily recognized pictures invited broad participation across age, literacy, and language boundaries. Begin by co-designing a library of symbols with community artists, followed by small pilots that test whether each image truly conveys the intended idea before scaling the exercise. When community members arranged icons of harvest baskets beside images depicting shared rituals, they debated the relative importance of each outcome. They quickly converged on a concise, locally meaningful set of measures. This visual, hands-on approach reduced survey fatigue, minimized redundant data points, and strengthened the validity of resulting metrics because every selected indicator had already passed through public scrutiny and collective endorsement.

Where connectivity is limited, lightweight mobile applications that store rankings offline and synchronize later can preserve the participatory spirit while smoothing data aggregation, ensuring that community judgments flow seamlessly into broader analytic systems.

## Case Study Insights: Survey Design

### Identifying Themes

Discussions highlighted how deeply held beliefs about witchcraft and spiritual causality shape community interpretations of everyday events, including crop loss and illness. Standard survey language probing directly into misfortune or household assets can provoke suspicion and disengagement. Participants found that reframing data-

collection conversations around themes of resilience and celebration—such as abundant harvests or collective successes—created a safer space for dialogue. This positive framing, coupled with up-front explanations of how information would benefit the community, emerged as a pivotal strategy for sustaining trust and participation.

### Challenges and Barriers

Crafting culturally consonant instruments required intensive collaboration with local elders to map taboo subjects and acceptable metaphors, a process that often extended timelines. Translating technical terminology into idiomatic expressions proved difficult, and some images failed initial vetting because they unintentionally evoked negative spiritual connotations. Communities that preferred collective decision-making sometimes insisted on public consent ceremonies, complicating adherence to standardized individual consent protocols. Moreover, intermittent connectivity hindered real-time adjustments when enumerators encountered unforeseen linguistic or cultural nuances in the field.

### Lessons Learned and Recommendations

Every survey initiative should begin with a dedicated cultural scoping exercise that surfaces sensitive topics and identifies protective language before drafting any questions. Consent procedures should accommodate oral or group affirmation, supported by storyboards that visually convey intent where written text may alienate.

Instruments should undergo multiple rounds of small-group piloting, allowing facilitators to refine wording, imagery, and sequencing until questions evoke neither distrust nor apprehension. Field tests demonstrated that questionnaires referencing “challenges” or “problems” consistently returned low completion rates, whereas instruments that invited stories of overcoming adversity encouraged fuller, more candid responses.

Enumerators reported that visual aids—illustrations of granaries, seedlings, or shared rituals—helped respondents navigate abstract concepts without relying on literacy. Repeated piloting and cognitive debriefing clarified that even subtle shifts in phrasing could transform a question perceived as ominous into one regarded as respectful inquiry. When communities sensed that the purpose of the survey aligned with their own aspirations, cooperation deepened and data quality improved markedly.

Finally, enumerator training must emphasize cultural listening skills alongside methodological rigor, equipping local teams to navigate spiritual concerns while preserving ethical and analytical standards.

## Embedding Resilience and Sustainability

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Systemic resilience and sustainability ensure that MEAL systems endure organizational changes, funding shifts, and external crises without compromising data integrity or learning capacity. Embedding resilience and sustainability into MEAL practice calls for an architectural shift from isolated tools and ad-hoc procedures toward an integrated system that can withstand personnel transitions, resource fluctuations, and external shocks without eroding data integrity or learning momentum. Participants discussed institutionalized succession mechanisms and cross-sector collaboration as practices that safeguard hard-won knowledge and narrative assets when staff depart. Resilient MEAL systems operate within trust-based frameworks for shared learning and authentic accountability. This creates opportunities for more sustainable partnerships with a diverse group of funders while enhancing the credibility and utility of impact measurement.

### Participant-Identified Priorities

#### Cross-Sector Collaboration

Participants recommended forging partnerships with peer NGOs, research institutions, and UN agencies to share indicator libraries, co-develop training materials, share open-source platforms, and participate in collective learning platforms. Such collaboration leverages existing sectoral expertise, enhances technical credibility, and enables smaller organizations to access validated measurement tools without recreating complex frameworks. Cross-sector collaboration can encompass shared training resources, collaborative research initiatives, and joint capacity-building efforts that leverage collective expertise and tools. These partnerships enable smaller organizations to access sophisticated technical capabilities while contributing local knowledge and contextual insights to broader learning initiatives.

The adoption of internationally recognized indicators—such as the UNDP Multidimensional Poverty Index (MPI) or FAO’s Tool for Agroecology Performance Evaluation (TAPE)—was highlighted as essential for reducing redundant metric development and facilitating cross-organization benchmarking. Standardized indicators are sophisticated measurement tools that have undergone extensive validation and refinement through academic research and field application. These indicators offer technical credibility and cross-sectoral comparability that individual organizations cannot achieve through independent development efforts. Adoption also enables organizations to contribute to broader knowledge development by participating in collective measurement initiatives and shared learning platforms.

This collaboration approach reduces redundant metric development that occurs when multiple organizations attempt to measure similar outcomes using different frameworks that prevent comparison and collective analysis. Standardized indicators enable meta-analysis, sector-wide learning, and evidence-based policy development that benefits the entire development community while reducing individual organizational resource requirements.

### Institutional Memory Preservation

Symposium participants recognized the fundamental importance of preserving institutional memory that accumulates through MEAL activities, particularly qualitative insights and contextual knowledge that cannot be easily quantified or systematized. Institutional memory preservation requires systematic documentation of lessons learned, relationship histories, and contextual understanding that inform effective programming and stakeholder engagement.

Documentation procedures must capture formal evaluation findings and informal insights, relationship dynamics, and contextual factors that influence program effectiveness. This documentation includes maintaining records of stakeholder preferences, community dynamics, successful engagement strategies, and lessons learned from both successful and unsuccessful interventions.

Contextual knowledge documentation captures environmental factors, cultural considerations, political dynamics, and local conditions influencing program implementation and evaluation approaches. This knowledge enables organizations to maintain contextual sensitivity and cultural appropriateness throughout staff transitions and programmatic changes.

## Complementary Insights

### Adaptive Capacity Development

Participants highlighted the need for MEAL systems to balance structural stability with procedural flexibility. Adaptive capacity development involves regular stress-testing of MEAL processes to identify procedural bottlenecks and resilience gaps. Combined with periodic reviews of crisis protocols and succession plans, these exercises ensure that MEAL systems remain robust yet agile when facing staff changes, funding shifts, or external disruptions.

This ensures that MEAL systems maintain core functionality during disruptions while demonstrating sufficient flexibility to accommodate changing circumstances and emerging opportunities. The balance between stability and adaptability enables organizations to preserve essential knowledge and relationships while remaining responsive to evolving contexts and stakeholder needs.

### Organizational Mission Alignment as Foundation for Sustainable Donor Partnerships

Symposium discussions revealed that sustainable, long-term and trust-based relationships require authentic alignment between organizational mission and donor values rather than adaptation of messaging to match donor preferences. This insight suggests that effective donor engagement involves identifying philanthropic partners whose values and strategic objectives genuinely complement organizational purpose rather than attempting to serve all potential donor interests. When alignment exists, donors become genuine partners in

programmatic development rather than external evaluators of organizational performance, creating space for shared learning and adaptive management.

Holistic MEAL systems within aligned partnerships serve collaborative inquiry functions rather than compliance documentation requirements. This enables more sophisticated analytical approaches including experimental program design, rigorous impact evaluation, and systematic learning processes that benefit both organizational effectiveness and donor understanding of development complexity.

### Cultural Transformation Through Evidence Integration

Trust-based MEAL approaches facilitate organizational cultural transformation by making evidence utilization central to strategic decision making rather than peripheral reporting requirements. When MEAL systems serve genuine learning functions, organizations develop cultures that prioritize continuous improvement, stakeholder engagement, and adaptive management over compliance and risk aversion.

Organizations experiencing this transformation report improved staff engagement, enhanced strategic planning capacity, and stronger community relationships as MEAL activities become integrated into organizational identity rather than remaining separate compliance functions. The transformation also creates a foundation for donor education regarding complex program contexts and the value of long-term partnership commitment.

## Case Study Insights: Organizational Growth Through Demonstrating Impact

### Identifying Themes

Organizations reported significant funding increases following implementation of systematic impact evaluation combined with authentic community storytelling that enabled credible communication with sophisticated donor audiences. Organizations with diverse donor portfolios reported success through developing tiered communication systems that draw from consistent underlying evidence while customizing presentation formats and analytical depth.

The most successful examples involved organizations that invested in internal MEAL capacity rather than relying solely on external evaluation consultants. This internal capacity enabled more responsive donor communication, deeper understanding of programmatic outcomes, and greater flexibility in adapting measurement approaches to serve both community needs and external accountability requirements.

### Challenges and Barriers

Implementation challenges emerged around organizational capacity requirements for maintaining sophisticated donor relationships while preserving community

engagement. Smaller organizations particularly struggled with developing sufficient technical and communication capacity to serve demanding analytical requirements while maintaining affordable and accessible MEAL systems.

Cultural resistance within organizations sometimes prevented adoption of learning-oriented MEAL approaches due to staff risk aversion and preference for compliance-focused documentation that felt safer than transparent analysis of programmatic outcomes and challenges. This resistance required sustained leadership commitment and staff development to overcome institutional habits that prioritized defensive positioning over genuine learning.

Communication challenges arose when organizations attempted to balance transparency regarding programmatic difficulties with maintaining donor confidence in organizational capacity and strategic direction. Successful navigation required sophisticated relationship management skills and a foundation of established trust that could withstand honest discussion of implementation complexity and attribution uncertainty.

### Lessons Learned and Recommendations

Experience demonstrated that breakthrough funding growth often follows rather than precedes investment in impact measurement capacity. Organizations that prioritized MEAL system development before launching major fundraising initiatives reported more sustainable donor relationships and higher success rates in securing significant philanthropic commitments.

The most effective donor engagement involved regular strategic dialogue that extended beyond formal reporting. Transparent communication regarding both successes and challenges actually strengthened rather than weakened donor relationships when supported by demonstrated competence and commitment to continuous improvement. This transparency created opportunities for collaborative problem-solving while preventing relationship deterioration that is commonly assumed when unexpected difficulties or disappointing outcomes arise.

Developing organizational leadership capacity to sustain this dialogue requires targeted investment in communication skills that enable navigation of difficult conversations while preserving partnership relationships and organizational credibility. Organizations should prioritize training in strategic dialogue techniques and establish internal systems that institutionalize regular, honest engagement with donors as an ongoing practice rather than an episodic reporting exercise.

## Next Steps: Advancing Holistic MEAL

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The 2025 Global Holistic MEAL Symposium produced actionable steps toward transforming monitoring, evaluation, accountability, and learning practices within the faith-based development sector and beyond. The advancement of holistic MEAL requires coordinated action across multiple stakeholder groups, systematic research to address methodological gaps, and institutional development that supports long-term capacity building and knowledge dissemination. These next steps focus on the foundational work necessary to mature holistic MEAL from emerging best practices into established professional standards that serve diverse organizational contexts and development objectives.

### Integrating MEAL into organizational DNA

Several fundamental questions need sustained research attention to support continued advancement of holistic MEAL theory and practice. How do cultural factors influence the validity and effectiveness of participatory measurement approaches across different implementation and organizational contexts? What organizational development models most effectively support MEAL integration without compromising program delivery effectiveness or community relationship quality? How can simplified measurement approaches maintain analytical rigor while accommodating varying organizational capacities and technical expertise levels? How do different organizational DNA characteristics influence the effectiveness of collaborative measurement approaches? What capacity development models most effectively prepare organizations for sophisticated donor engagement while maintaining authentic community focus?

Creating and implementing MEAL budget allocations addresses ongoing questions about how much investment is appropriate for measurement activities while ensuring organizations have enough capacity for rigorous methods and community engagement. These principles need to balance accountability requirements with program effectiveness considerations while providing guidance that works for organizations of different sizes, complexity levels, and operational contexts. The principles should reflect the trust-based philanthropy insights documented in this whitepaper, recognizing that sophisticated donor relationships require sustained investment in analytical capacity and community engagement systems.

Working with existing accountability frameworks creates opportunities to embed holistic MEAL principles into established oversight systems. Sharing this whitepaper and starting conversations with the Evangelical Council for Financial Accountability (ECFA) and the ACCORD Network about developing best practice principles and a framework for the percentage of budgets dedicated to MEAL is an essential step toward building holistic measurement standards into organizational accountability guidelines. These discussions should encourage ECFA to incorporate holistic MEAL principles into its accountability framework, setting a precedent for transparent accountability systems while recognizing that organizations differ in mission focus, operational context, and capacity. Likewise, conversations with the

Accord Network will help to drive peer-led standards of excellence for MEAL across Christian NGOs working in community development and relief.

## Strengthening Methodological Rigor

### Balancing Evidence-Based Validation with Simplified Participatory Methodologies

Several important methodological questions came up during symposium discussions that need systematic research to support evidence-based advancement of holistic MEAL practice. The distinction between stories and other forms of qualitative data has important implications for how organizations manage and validate data, and this deserves focused investigation into the best approaches for handling different types of qualitative information within integrated measurement systems. This research needs to address ethical considerations, community agency protection, and analytical validity requirements that enable authentic narrative integration without compromising methodological rigor.

How well simplified metrics work across diverse implementation contexts needs systematic evaluation to determine the best approaches for balancing comprehensive measurement with implementation feasibility. Research questions include identifying which multidimensional poverty indices maintain analytical validity when streamlined for field implementation, how cultural factors influence the validity of metrics, and what validation processes most effectively balance community agency with donor accountability requirements while preserving measurement credibility.

Participatory evaluation methodologies embedded within mixed research methodologies represent another area that needs focused research attention to strengthen community ownership while maintaining analytical standards necessary for credible impact assessment. Investigating power dynamics within collaborative measurement design, developing optimal facilitation approaches for inclusive participation, and developing sustainable models for community-led validation processes could significantly enhance the effectiveness and ethical foundation of holistic MEAL systems.

Advanced mixed-methods integration techniques need research attention to develop sophisticated approaches that balance analytical rigor with implementation feasibility in resource-constrained contexts. This includes examining models for effectively combining quantitative and qualitative data sources. Organizations also need sustainable approaches for real-time feedback loops that facilitate both accountability and learning.

### Technology Integration and Innovation Development

Digital platform development represents a significant area that needs focused attention to support holistic MEAL implementation across diverse technological contexts. Creating integrated systems that accommodate both quantitative tracking and narrative collection while maintaining data protection protocols and community privacy standards require sustained technical development and user experience research. These platforms need to function

effectively in low-connectivity environments while supporting real-time feedback loops and collaborative validation processes.

Artificial intelligence applications in development contexts require careful research on ethical implementation approaches that enhance analytical capacity while preventing donor overreach and protecting community agency. Investigation of the best AI-driven analysis tools that identify patterns invisible to human reviewers without compromising individual privacy represents a critical research priority for advancing methodological sophistication while maintaining ethical standards.

Critical evaluation of the use of mobile-compatible and off-line data collection systems that support participatory ranking tools and visual feedback mechanisms could significantly enhance community engagement capacity while reducing technical barriers to holistic MEAL implementation. These systems need constant attention on the best user interface design, offline functionality requirements, and integration with existing organizational data management systems.

## Deepening Stakeholder-centric Relationships

### Knowledge Networks and Professional Community Development

Building and engaging in lasting professional networks is a key priority for advancing holistic MEAL. Relevant professional networks and information clearinghouses include Act Alliance, Micah Global, and Reliefweb. At an organizational level, this could also look like an Accord Network supported Community of Practice for MEAL, with quarterly meetings and the infrastructure to support regular knowledge sharing and peer learning that keeps momentum going between the annual gatherings. This community could support cross-organizational collaboration while working with the reality that faith-based development organizations come in different sizes, have varying technical capacity, and are spread across the globe.

This focused effort should spark detailed conversations about how to implement MEAL holistically, how to adapt strategies for different organizational contexts, and how to plan for ongoing learning and development. This effort should also develop ways for continued knowledge sharing and help organizations pinpoint where peer support and collaboration could speed up implementation. Regional clusters offer a way to adapt holistic MEAL principles to specific contexts while staying connected to broader professional networks. These clusters help organizations tackle shared challenges related to cultural context, regulatory environments, and local partnership dynamics while contributing to global knowledge development by documenting how adaptation processes work and what outcomes they produce.

### Trust-Based Philanthropy Integration and Donor Engagement Evolution

Bringing trust-based philanthropy approaches together with holistic MEAL systems requires developing collaborative measurement frameworks that serve mutual accountability while reducing reporting burden and enhancing partnership sustainability. The three-pillar trust

framework (alignment, stories, and statistics) documented in this whitepaper needs focused attention to determine the best implementation approaches across different organizational contexts and donor relationship types. How do organizations most effectively demonstrate mission alignment while maintaining authentic community focus? What narrative validation processes best serve both community agency and donor communication needs? How can statistical evidence serve relationship building rather than compliance documentation while meeting sophisticated analytical requirements? This requires dedicated communication between stakeholders, ensuring community ownership of evaluation processes by facilitating their own selection of success indicators as part of the MEAL process, and adaptive and listening teams at organizations to communicate this with integrity to donors.

Developing organizational capacity assessment tools specifically designed for trust-based MEAL implementation represents another research priority. These tools need to identify organizational DNA characteristics that predict successful MEAL integration, the best approaches for building donor engagement capacity while preserving community focus, and sustainable models for maintaining sophisticated analytical capacity within resource-constrained organizational contexts.

### Embedding Resilience and Sustainability of Future Partnership and Convening Priorities

Building academic partnerships is a priority for supporting sustained research and knowledge development. Collaboration with universities and research institutions could provide analytical capacity for systematic evaluation of holistic MEAL approaches while creating opportunities for graduate student engagement and dissertation research that advances the field. These partnerships could also support longitudinal studies examining the effectiveness of different implementation models and their resilient impact on both organizational effectiveness and community development outcomes.

Future convening opportunities should address these research questions while facilitating continued peer learning and professional network development. Regional symposia could enable context-specific exploration of holistic MEAL adaptation while maintaining connection to global knowledge development. Specialized workshops focusing on particular methodological challenges or organizational contexts could deepen technical capacity and address specific implementation barriers.

### Sustainable Financing and Institutional Support Models

Developing sustainable financing models for continued holistic MEAL advancement requires investigation of the best resource mobilization strategies that support both immediate implementation needs and long-term research and development activities. This includes examining donor interest in supporting MEAL capacity development as a standalone priority area, identifying potential partnership opportunities with foundations focused on organizational

effectiveness, and evaluating fee-for-service models that support ongoing technical assistance and training activities.

Institutional support for continued knowledge development and dissemination requires establishing organizational structures capable of maintaining momentum beyond initial symposium outcomes. This could involve designating lead organizations responsible for different aspects of holistic MEAL advancement, creating formal partnerships that distribute responsibility for various research priorities, or establishing new institutional arrangements specifically designed to support ongoing professional development and standards advancement.

Integrating holistic MEAL principles into existing development-practice training programs represents another opportunity for sustainable advancement through institutional embedding. Collaboration with universities and professional training organizations could ensure that emerging practitioners receive exposure to holistic MEAL approaches while contributing to continued innovation and adaptation based on changing development contexts and emerging challenges.

These next steps require coordinated action across multiple stakeholder groups combined with sustained commitment to systematic learning and adaptation as holistic MEAL practices mature and expand beyond their current implementation contexts. Success depends on maintaining the collaborative spirit and learning orientation that characterized the 2025 symposium while developing institutional capacity sufficient to support long-term advancement of the field.

## Validated Measurement Tools and Resources: A Starting Point for Evidence-Based Practice

Organizations implementing holistic MEAL systems benefit from adopting validated evaluation frameworks and participatory methodologies that have undergone rigorous testing across diverse contexts. The tools and resources presented here represent a starting point for identifying appropriate instruments and approaches suited to specific organizational contexts and development objectives, recognizing that no single framework addresses all measurement priorities. Organizations must select and adapt these resources based on their particular missions, operational contexts, and community engagement commitments. Practitioners are encouraged to view this inventory as a foundation for evidence-based practice rather than a prescriptive checklist, adapting these tools through participatory processes with communities and stakeholders to ensure cultural appropriateness and contextual relevance.

### Development Indices and Comprehensive Poverty Measurement

Organizations seeking standardized multidimensional approaches to poverty assessment can draw upon several validated indices that extend beyond income-based measures. The [Multidimensional Poverty Index \(MPI\)](#), developed by the Oxford Poverty and Human Development Initiative in collaboration with UNDP, assesses poverty across three dimensions: health, education, and living standards using the rigorous Alkire-Foster methodology. The MPI

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has been formally adopted into national statistical systems and the UN's Sustainable Development Goals (SDGs) monitoring frameworks in multiple countries, with reliability demonstrated through extensive validation using household survey data from Demographic and Health Surveys and Multiple Indicator Cluster Surveys.

The [Human Development Index \(UN\)](#) combines three fundamental development dimensions into a single measure: health as reflected in life expectancy at birth, education captured through expected years of schooling and mean years of schooling, and standard of living indicated by gross national income per capita adjusted for purchasing power parity. This approach provides a concise gauge of human development that complements purely economic indicators while highlighting broader aspects of well-being.

### Health and Demographic Measurement Systems

The [Demographic and Health Surveys Program STATcompiler](#) provides standardized, validated demographic and health indicators across more than 70 countries, employing rigorous comparability assessments that ensure consistency across countries and over time. The tool has been extensively used by USAID and other development organizations for evidence-based decision making, with validation studies demonstrating its accuracy in measuring maternal, newborn, and child health coverage indicators.

### Poverty Targeting and Cost-Effective Assessment

The [Poverty Probability Index \(PPI\)](#) represents a validated, cost-effective tool for poverty measurement certified by USAID under the Balanced Poverty Accuracy Criterion. Demonstrating accuracy within  $\pm 2$  percentage points at 90 percent confidence intervals for aggregate portfolios, the PPI enables trained field staff to complete assessments in approximately five minutes while maintaining high reliability. Country-specific scorecards have been calibrated using the most powerful statistical indicators of poverty within each national context.

### Livelihood-Based and Contextual Frameworks

The [Household Economy Analysis \(HEA\) Toolkit](#), developed by Save the Children, represents a validated livelihoods-based framework for analyzing how households obtain access to essential resources. HEA's rigorous three-component methodology addresses livelihood zoning, wealth breakdown, and livelihood strategy analysis, each validated through extensive field application since the 1980s. The approach has been validated through comparative studies with other targeting methods and includes applications in early warning systems, social protection programs, and emergency response across diverse geographic contexts.

### Systems-Informed Monitoring, Evaluation and Learning

For organizations grappling with the complexity of systemic interventions, [MEL 360: Monitoring, Evaluation and Learning for Systems Change](#) offers a structured approach to integrating systems thinking into established practice. Recently published by the UNDP, this guide provides practical methods for layering complexity awareness and adaptive

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management onto existing frameworks, such as Results-Based Management. It is particularly relevant for practitioners seeking to enhance learning and impact in complex contexts, including food systems, without discarding familiar tools. The resource supports designers, managers, and funders in assessing contextual readiness and identifying entry points for systems-informed inquiry.

### Agricultural Sustainability and Food Systems Assessment

The [Tool for Agroecology Performance Evaluation \(TAPE\)](#), developed by the Food and Agriculture Organization of the United Nations (FAO), represents a validated global multidimensional analytical framework addressing agroecological transition assessment across sustainability dimensions. TAPE was developed through extensive multi-stakeholder consultation involving over 450 participants and 70 experts from academia, civil society, government, and international organizations. The tool's stepwise methodology includes context and territorial description, characterization of agroecological transitions based on the FAO's 10 Elements of Agroecology, performance assessment using traffic-light systems across sustainability dimensions, and participatory validation. Practical application across 58 countries has demonstrated strong positive correlations between agroecological integration scores and environmental, economic, and social performance indicators.

To further support the selection of rigorous indicators, the [Transitions Metrics Library](#) (currently in demonstration version) serves as a comprehensive repository for evaluating agrifood system performance. Developed by the TRANSITIONS Programme, this digital library aggregates metrics from over 200 existing assessment methods and 8,000 scientific articles. It allows practitioners to filter and select validated indicators across field, farm, and landscape scales, ensuring that measurement systems are holistically aligned with agroecological principles and specific project needs.

### Global Development Goals and Indicator Frameworks

The [UN SDG Indicators](#) framework represents a validated system for monitoring progress toward the 2030 Agenda, developed through extensive consultation with the Inter-Agency Expert Group on SDGs and various repository agencies. The framework employs a TIER classification system that categorizes indicators based on their level of methodological development and data coverage, ensuring that only validated methodologies are used for global monitoring.

For small to mid-size organizations seeking practical, accessible indicators across diverse sectors, [Indikit](#) (developed by People in Need) provides an open-source resource offering sector-specific indicators that are measurable and achievable for organizations with limited resources. Unlike UN-level SDG indicators that may exceed the measurement capacity of smaller NGOs, Indikit offers practical, field-tested indicators applicable to community-level programming across various development sectors.

## Holistic Flourishing and Community Transformation Frameworks

Organizations working on holistic transformation and community flourishing can draw upon additional validated frameworks. [Harvard's Human Flourishing Program](#) provides comprehensive approaches to measuring multidimensional well-being and human flourishing. [Tearfund's Church and Community Transformation \(CCT\)](#) framework offers faith-based organizations a tool specifically designed for measuring transformation within and through church communities, while [Tearfund's Lightwheel](#) provides visual assessment tools suited for faith-based organizations working on holistic community development.

[Barna's New Metrics for Measuring What Matters: Flourishing People and Thriving Churches](#) offers research-based metrics for faith-informed assessment of community well-being and institutional health. [Global Hope International's Transformational Community Development \(TCD\)](#) framework emphasizes long-term sustainable transformation through comprehensive community engagement. [LEAD Global's Theory of Change](#), particularly their Change 4 framework on Enabling Flourishing Livelihoods, provides structured approaches for organizations seeking to design measurement systems aligned with explicit theories of how change occurs. The [ESTEEM framework](#) from Innovation for Poverty Action offers evidence-based approaches for measuring economic empowerment and sustainable livelihoods outcomes.

## Participatory Methods and Community-Centered Approaches

Recognizing that participatory approaches represent a cornerstone of holistic MEAL practice, organizations can draw upon extensive methodological resources. [MEAS Methods and Tools](#) provides comprehensive guidance on participatory measurement methodologies suited to agricultural and community development contexts. [ECHOcommunity.org's Extension on Participatory Methods](#) offers accessible resources for implementing participatory approaches across diverse settings and organizational contexts.

## Resilience Assessment and Crisis Response

The [CRS Resilience Framework](#) provides organizations with comprehensive approaches to measuring resilience across household, community, and institutional levels, offering particular value for organizations working in volatile or resource-constrained environments where crisis adaptation represents an ongoing priority.

## Establishing a Community of Practice

Organizations implementing these frameworks benefit from participation in professional networks that support ongoing knowledge sharing and adaptation. An [ECHOcommunity.org](#) collection devoted to validated measurement tools could provide a centralized resource library enabling organizations to access tools, documentation, and peer experiences. Professional networks such as the Accord Network communities of practice, Act Alliance, Micah Global, and

## Cultivating our MEAL systems: Insights from the 2025 Global Holistic MEAL Symposium

Reliefweb offer opportunities for organizations to engage in collective learning while sharing context-specific adaptations and implementation experiences.

Organizations adopting these validated frameworks are encouraged to engage in participatory adaptation processes that ensure cultural appropriateness while maintaining measurement rigor. The measurement tools discussed here have undergone rigorous validation and can support the development of simplified indicators without compromising accuracy or reliability, enabling organizations of varying technical capacity to implement evidence-based measurement practices suited to their particular contexts and missions. Organizations are also encouraged to continually share what they are learning with the authors of this white paper- a key element of MEAL!

## Appendix: Charrette Format

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This whitepaper is the result of case-study exchanges, facilitated charrettes on best practices, a structured survey completed by symposium attendees, and discussions synthesizing contextualized priorities and insights at the 2025 Global Holistic MEAL Symposium.

### What is a charette?

A charette is an **intensive, collaborative feedback session** where a group of people, often including designers, stakeholders, community members, and experts, come together to **develop solutions to a challenge** within a short time frame. It is goal orientated, creative and iterative. It originates from urban planning but has been adapted here to discuss best practices. This process can be successfully applied to any context. For organizations it can be used to discuss *best practices on any given topic* (e.g., localization, MEAL, partnership, gender mainstreaming, climate resilience etc.).

Key outcomes of the Charette process:

- Produce **practical, consensus-built outputs** (not just abstract discussions).
- Build **ownership and accountability** for implementation.
- Create a shared “toolkit” of practices that is rooted in collective experience.

### Steps for implementing a charette

The stages are adaptable depending on the topic, but the flow stays the same: **prepare** → **explore** → **design** → **refine** → **commit** → **follow up**. Its strength is it accelerates co-creation and helps produce solutions that are both innovative and broadly supported.

#### 1. Preparation & Scoping (Pre-charette)

- Stakeholder and participant mapping: Identify whose voices must be included (e.g. community members, staff, donors, partners, government representatives).
- Facilitation setup and logistics: Identify both a main charette facilitator and small-group facilitators. Establish pre-defined ground rules as facilitating team. Secure venue, materials (visual tools, translation), and an agenda.
- Clarify objectives: Define what “best practices” you want to generate (e.g., guidelines, models, frameworks, tools). Decide if small groups might be best comprised out of participants with diverse backgrounds or whether forming groups with similar experiences or characteristics might enable a safer dialogue space.
- Background pack: Share existing policies, evaluations, or case studies to ensure informed contributions.

*Output: A clear scope, objectives, and a prepared facilitation and participant group.*

## 2. Orientation & Trust-Building (Opening)

- Welcome & context setting: The main facilitator explains why the charrette format is being used, how it works and what outputs are expected. Establish ground rules and shared principles for engagement (such as respect, openness, equity, time discipline).

*Output: Shared understanding of purpose and dignified, open participation.*

## 3. Exploration & Problem Mapping (Scope of the charette)

- Current state analysis: Using questions provided by the main facilitator, small groups map existing practices, tools, and experiences in the topic area. Identify challenges and opportunities through the use of participatory tools (e.g. SWOT, power mapping, river of life, timeline mapping). Each small group is facilitated by someone who understands the subject matter and can ask follow-up questions.
- Thematic clustering: The main facilitator will group issues into priority areas (e.g., decision-making, feedback, learning, resource flows).

*Output: A collective map of the current state and key gaps.*

## 4. Ideation & Co-Design (Core of charette)

- Breakout design teams: The small groups of participants tackle one priority for each theme using questions provided by the main facilitator. These conversations are facilitated by small group facilitators who understand the topic and can ask follow-up questions. Groups consisting of 4-8 participants work well to facilitate dynamic discussion while encouraging input from all participants.
- Prototyping in rapid cycles: Draft best practices, frameworks, or tools (visual diagrams, principles, models) in short, time-boxed sessions to maximize creativity.

*Output: Draft best practices for each theme.*

## 5. Feedback & Iteration (Mid-charette)

- Feedback session: Each small group facilitator moves to another small group to/with whom they 1) provide a 1-minute summary of the discussion they had with their previous group and 2) facilitate structured feedback on the initial answers (e.g. "what's strong / missing / risky / needs greater detail").
- Refinement: Groups revise and strengthen outputs, merging overlapping ideas.

*Output: Refined, community-reviewed drafts of best practices.*

## 6. Synthesis & Committed Action Planning

- Validation session: The main facilitator synthesizes the different outputs into one coherent framework. Small group facilitators validate this framework, revising as necessary based on the charrette discussions.

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- All participants: Focus on consensus building by facilitating discussion and prioritization of the validated framework (e.g., dot-voting, ranking). Agree which practices are “core” vs “optional/adaptable”.
- Action mapping: Define “who will do what, by when” for piloting and refining the practices.
- Reflection: Space for participants to share insights and commitments. Formalize next steps and celebrate joint ownership of outputs.

*Output: Best Practices Framework for the chosen topic with a commitment matrix defining ownership of next steps.*

### 7. Post-Charrette Follow-Up

- Documentation: Produce a concise, user-friendly “Best Practices Guide” from the charrette.
- Validation & consultation: Share drafts with wider stakeholders (especially those unable to attend).
- Piloting: Test practices in selected projects/contexts.
- Institutionalization: Integrate into policies, training, and partnership agreements.

*Output: Living best practices framework embedded in organizational systems.*