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EXTERNAL MONITORING AND EVALUATION  
MECHANISM FOR THE EUROPEAN UNION REGIONAL  
TRUST FUND IN RESPONSE TO THE SYRIAN CRISIS

Service Contract N. TF-MADAD/2020/T04.225

# THE EUTF SYRIA MONITORING, EVALUATION AND REPORTING SYSTEM

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## DEVELOPMENT, ACHIEVEMENTS AND LESSONS LEARNED

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## MONITORING AND EVALUATION SYSTEM IN THE EUTF SYRIA: AIMS AND OBJECTIVES



In the spirit of the **Agenda for Change (2011), monitoring and evaluation (M&E) within the EU Regional Trust Fund** in Response to the Syria Crisis (EUTF Syria) ensures the accountability and transparency to the European Parliament,

the Trust Fund Board, partner countries, and supported communities. In addition, the M&E system informs the broader public and provides relevant information to make effective internal management decisions.

In this context, the overall objective was to implement a comprehensive and effective M&E mechanism for the EUTF Syria based on three specific objectives:



**DATA COLLECTION AND ANALYSIS**

To measure the effectiveness of EUTF actions through centralised data collection and analysis, using disaggregated quarterly results reporting.



**RESULTS-ORIENTED-MONITORING (ROM)**

To provide evidence-based knowledge on progress achieved by EUTF Syria funded projects, and to inform on the management, through regular and ad-hoc results-oriented monitoring (ROM).



**EVALUATION**

To evaluate the sustainability, efficiency and effectiveness of EUTF Syria funded programmes/ projects at thematic and geographic level and to assess potential prospects of impact through portfolio evaluations.



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## EUTF SYRIA M&E: SYSTEM DEVELOPMENT AND CURRENT STRUCTURE



The M&E system was designed from the outset as a three-components mechanism - Data Analysis, ROM and Evaluation to provide both qualitative and quantitative information on the overall EUTF Syria initiative as well as individual project results. It is important to note that the M&E system has

evolved to meet the specific monitoring, evaluation and learning needs of EUTF Syria stakeholders, mainly the EUTF Syria management team and EU delegations. While the first EUTF Syria M&E phase ran from 2017 to 2020, the second phase will last from 2021 until January 2026.

## FIRST PHASE 2017-2020 | QUANTITATIVE AGGREGATION OF EUTF SYRIA PROGRESS

The focus of this first phase was largely on collecting quantitative project results and aggregating them at EUTF Syria level to assess progress. The first tool developed was the Quarterly Information Notes (QINs), which served as the basis for the annual results report. ROM then became a complementary tool that analysed results at project level at a specific point in time, while the evaluations examined results beyond outputs at overall sector/portfolio level.

and entered in the EUTF database with the focus on the indicators that feed into the EUTF Results Framework. The EUTF database contains key updated information on the projects, QIN reporting date and results-related information - objectives, outcomes, outputs and indicators. This data is the main source of quantitative EUTF Syria information at project and EUTF level. Continuous quality improvements have been actioned, such as a greater breakdown of information by gender and community of origin and the reduction of double counting.

### DATA COLLECTION AND ANALYSIS

The first external M&E contract was initiated at the end of 2017, followed shortly thereafter by the publication of the first annual results report, primarily informed by the QINs. This initial report covered 27 projects and by the end of 2020 the sixth report encompassed 73 projects.

Following the second results report, the EUTF Results Framework was revised to rationalise the number of KPIs reducing them to 44 and to update the categorisation of indicators to reflect the current distinctions: access to services, strengthening local capacities, and local infrastructure. The EUTF Syria Helpdesk was then also established to support implementing partners in complying with QIN and reporting requirements. An important task in this context was the revision of the logframes of projects and action documents.

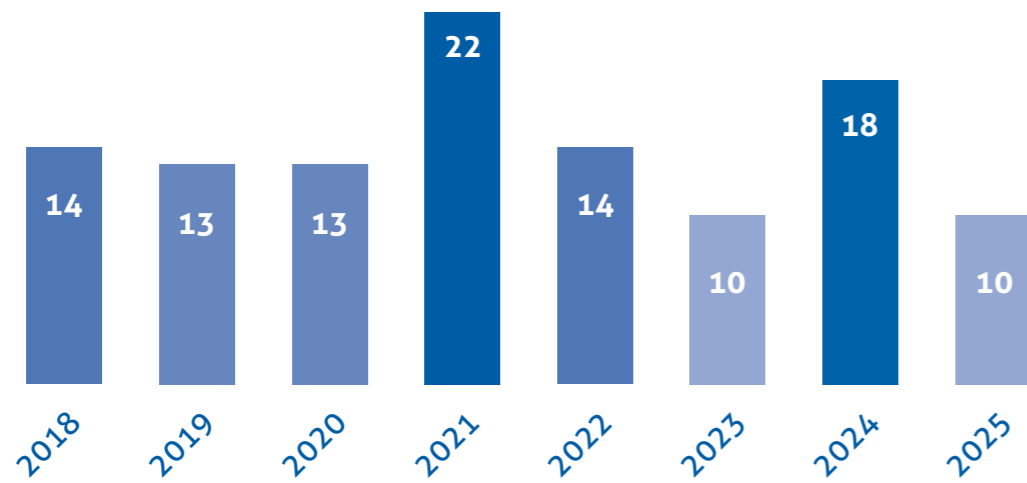
The original EUTF Syria intervention logic formed the basis for the development of the first overarching EUTF Results Framework (2018) which comprised of 81 key performance indicators (KPIs) across six sectors (basic education, higher education, health, livelihoods and protection).

In 2018, the online platform AKVO RSR (Really Simple Reporting) was introduced to provide real-time access to results information at project level (publicly accessible) and EUTF level (for administrators only). The AKVO RSR has been

The project QINs, based on the project logframes, are provided on a quarterly basis, by the implementing partners. These are then coded



Number of ROM missions in EUTF Syria by year 2018-2025



regularly updated with the QIN-based information and enables the creation of ad-hoc project reports. It features an interactive geographical tool that maps all EUTF Syria projects. In 2019, information and training events have been carried out in Brussels, Lebanon and Jordan for the EUTF team and implementing partners to promote the use of AKVO RSR and to address QIN-related issues.

**RESULTS ORIENTED MONITORING (ROM)**

Based on the existing EU ROM Handbooks, the ROM methodology was customised to the specific needs and characteristics of the EUTF Syria. ROM missions aim at creating evidence-based knowledge about individual project results, provide recommendations to improve performance and identify potential good practices.

Standard “on-going ROM review” missions were launched since 2018 with a total of 40 ROM missions conducted during the first EUTF phase (Figure 1). During this phase, two third-party ROMs for Iraq were also conducted. In addition, in 2020, an innovative in-depth ROM mission was

conducted. Two experts with different professional profiles were engaged to conduct a more comprehensive assessment of a complex project.

**EVALUATION**

Impact-oriented evaluation complemented the ROM and data analysis components to provide a medium and longer-term perspective for assessing results. The Evaluation component also enables programming, accountability, communication and learning needs. In 2018, the first EUTF Syria evaluation strategy was developed to serve as the main guideline for implementing this component. Sector, country and horizontal evaluations are considered as the main tools, following a cross-methodological approach. The first sector/portfolio evaluation was also carried out in 2018 (higher education) and followed by more evaluations (Figure 2).

**EUTF Syria evaluations**

Scope	Year
Higher Education	2018
Mid-term strategic EUTF evaluation	2018
Livelihoods	2019
Basic Education	2019
Health	2020
WASH	2022
EUTF Outcome Evaluation	2023
Regional Education Study	2025
EUTF Final Evaluation	2025
Livelihoods Update	2025

**SECOND PHASE 2021-2025**

**MOVING TOWARDS COMPREHENSIVE EUTF SYRIA PROGRESS**

The need to better articulate qualitative and quantitative outcome information, as well as outputs, in order to obtain a more comprehensive overview of the actual EUTF Syria progress, characterised the second phase of the EUTF Syria M&E system development.

**DATA COLLECTION AND ANALYSIS**

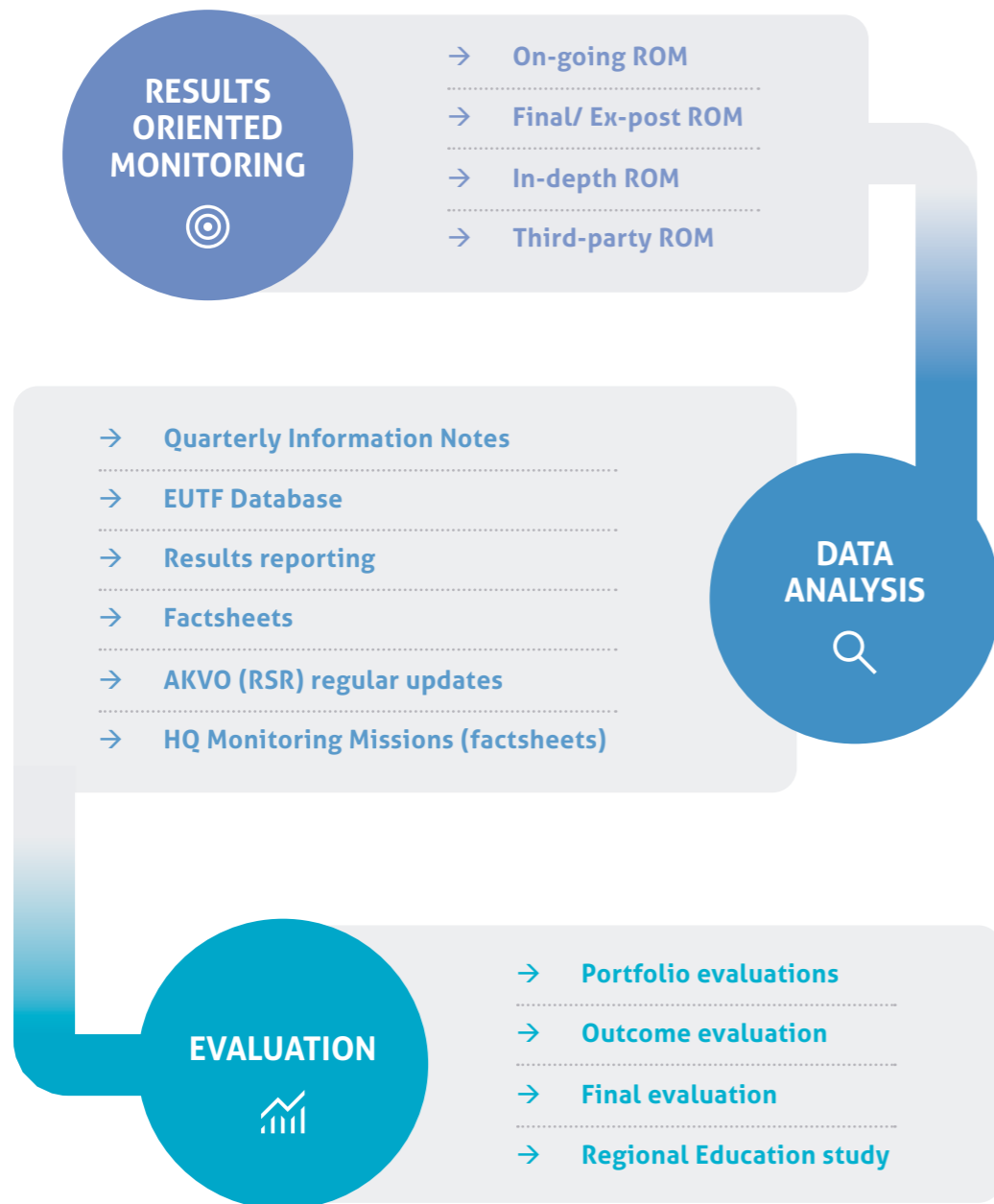
The EUTF Syria Results Framework was further revised and initiated within the 8th results report (37 KPIs categorised into seven sectors) covering 77 projects. The template has not changed since

then. However, during and immediately after the pandemic an additional COVID-19 section was created within the results reports to illustrate the EUTF’s response. The number of EUTF projects has continued to increase and currently totals 109.

The increasing need to include qualitative, results-related information in the reporting has led to the development of the EUTF Strategic Outcome Framework, which was introduced in the 9th Annual Report. Concurrently, Outcome Harvesting was piloted in various ROM exercises to examine them more intensively regarding the outcomes achieved.



### EUTF Syria M&E System: Structure and main deliverables



In response to ad-hoc requests for sector, thematic and country-specific results, the Factsheet tool was introduced in 2022 using quantitative and qualitative data from QINs, ROMs and evaluations. To date, 21 factsheets have been produced and disseminated and 4 are being prepared.

EUTF Syria final evaluation was launched in 2024 to assess the overall functioning, performance and impact of the EUTF Syria and to provide an overview of the strengths and weaknesses of the Trust Fund model. It also included lessons learnt for future support directly towards Syria.

The need to increasingly link results-related information with the EUTF Syria communication efforts has led to the creation of communication materials, such as content for social media that are aligned with the actual project results. In the second phase of the EUTF M&E, the co-operation between the EUTF Syria communication team and M&E technical assistance has improved significantly through a regular exchange of information and materials.

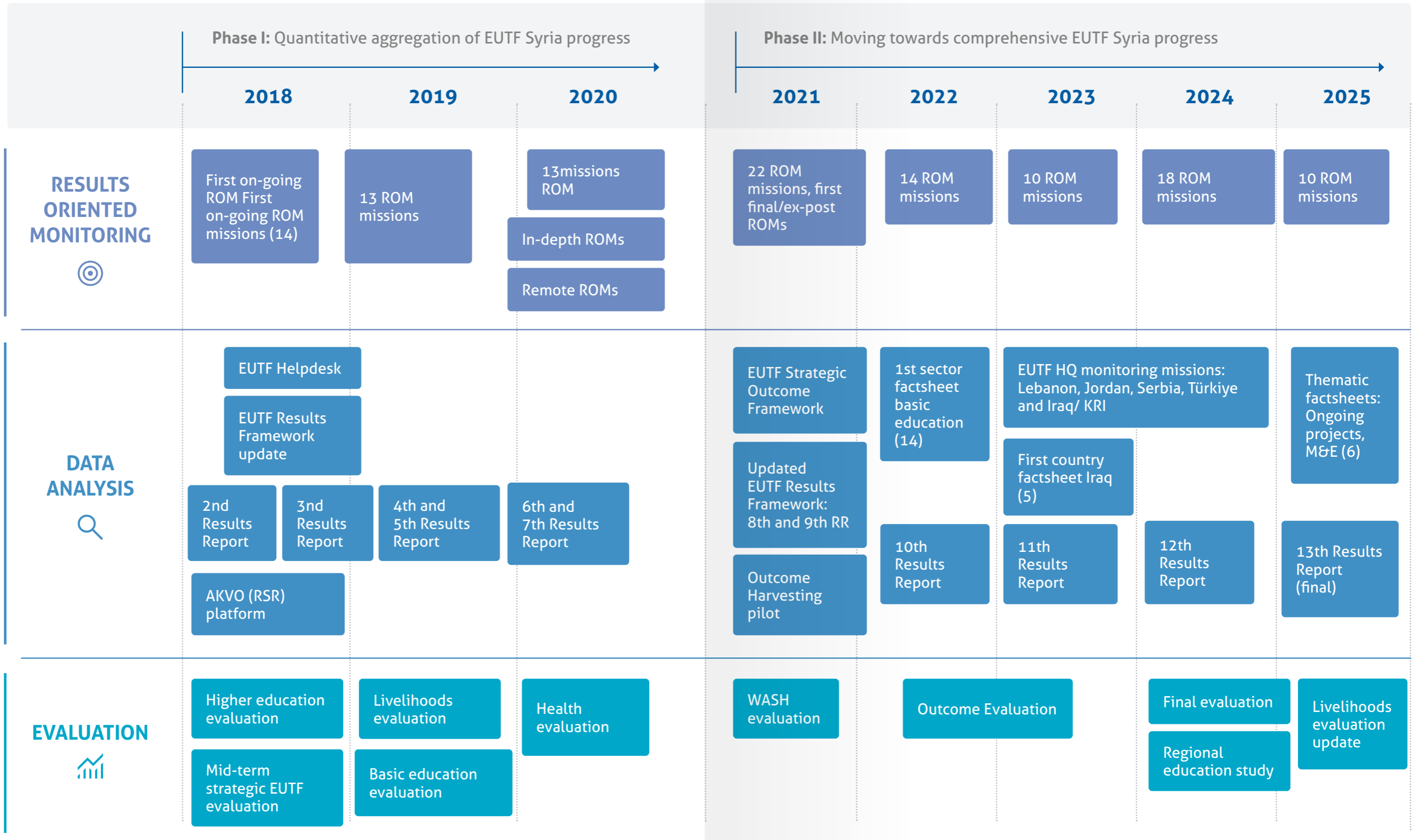
Furthermore, a new type of research product has been developed to meet the additional needs of EU delegations for sector-specific and comparative knowledge on EUTF Syria interventions. The regional education study compared different formal and non-formal education approaches and strategies supported by the EUTF Syria in Lebanon, Jordan and Türkiye to extract lessons learned.

#### RESULTS ORIENTED MONITORING (ROM)

During the second EUTF Syria M&E phase and up to the end of 2025, 74 ROM visits will have been part of the ROM component. "Final/ex-post" ROM was added as a new category to enable a deeper assessment of the sustainability, potential mid-term outcomes and lessons learnt for future programming. As part of the approach to increase in-depth monitoring of EUTF results, the EUTF management team at headquarters also conducted a series of monitoring missions to partner countries: projects in Lebanon (2023), Jordan (2024), Serbia (2024), Türkiye (2024) and the Kurdistan Region of Iraq (2025).

#### EVALUATION

The need to generate more information on outcomes also guided the evaluation component, including the evaluation of the WASH sector in 2021, which provided additional learning about the challenges in this sector. In 2022, the EUTF outcome evaluation was conducted to assess the actual outcomes of the interventions funded by the EUTF Syria and to identify lessons learnt. The





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## EFFECTIVENESS AND IMPACT OF THE EUTF SYRIA M&E SYSTEM



Overall, in quantitative terms, the EUTF Syria M&E system will deliver 13 results reports, 114 ROM reports, 9 evaluations and one regional study, plus 25 factsheets. The results reports, an overview of the ROM reports and the main recommendations of the evaluations were regularly presented to the EUTF Board and are publicly available. All products have been widely used, as shown below.<sup>1</sup>

#### **Aggregation of project results and improved performance measurement:**

Work on data analysis began with quality control of the QINs to ensure the coherence and validity of the data for regular results reporting. However, it soon became clear that the logframes in the project descriptions and action documents needed to be reviewed. In turn, this process has enabled project results to be aggregated at EUTF level and an improved alignment with the EUTF Results Framework has improved EUTF performance measurement. In addition, the implementing partners were able to have an additional tool to measure their project performance.

#### **Continuous feedback and steady monitoring of project performance:**

ROM served as the basis for regular performance reporting, particularly on qualitative results, as well as for sector, outcome and final evaluations. ROM was also an important contribution to the sectoral, thematic and country factsheets. ROM reports are an effective starting point for any project or EUTF evaluation as they provide a snapshot of actions by highlighting achievements, good practices as well as challenges. ROM reports enabled the continuous measurement of project performance, highlighted where corrective action needed to be taken to improve implementation and helped to calibrate some emerging results.

In addition, operational managers in the EU delegations used the QINs to get a regular update on the level of activities. They also gained a more comprehensive view about the performance of the EUTF Syria projects under their supervision.

#### **Fostered adaptability and flexibility of M&E tools:**

Sectoral, country-specific, and thematic factsheets are additional outputs that draw primarily on the EUTF database, complemented by ROMs and evaluations. The wide range and volume of these factsheets demonstrate the flexibility of products generated using the EUTF database. EU delegations find them particularly useful for gaining an overview of the EUTF portfolio by country. The ROM system has also been able to adapt flexibly to the changing EUTF requests, i.e. through different types of ROM missions. For example, the “Final/ ex-post” ROMs being conducted to assess results (outcomes and impact) at the end of implementation or after the project completion exemplifies it. Furthermore, different types of evaluations, such as outcome or final evaluation and, more recently, the regional education study, which focuses more on the learning objectives within a sector, illustrate the adaptability of this component over time.

#### **Regular dialogue about the QINs increased trust:**

The quality control of QINs has been another important task for results reporting. The regular dialogue between the EUTF Syria Helpdesk and the EUTF Syria implementing partners has enabled a positive and trusting working environment to regularly improve the QINs. Nevertheless, challenges remain, for instance in relation to double counting.

→ 1. The EUTF M&E website can be found at: [https://trustfund-syria-region.ec.europa.eu/monitoring-evaluation\\_en](https://trustfund-syria-region.ec.europa.eu/monitoring-evaluation_en).



**Improved outcome orientation in results reporting:**

The EUTF Strategic Outcome Framework was developed to move beyond a focus on output towards outcome reporting. A qualitative outcome database was developed to improve outcome reporting and to support ROM and evaluations. The framework has undoubtedly improved results reporting in the annual results reports, in addition to providing greater consistency in evaluations. The main limitation of this framework is that the EUTF Syria funded projects did not use it in their designs from the beginning, so the scope remained somewhat limited.

**Improved quality of programming and identification of good practices:**

Evaluations have informed decision-making - for instance, by enhancing the design of similar projects through improved programming. The higher education evaluation contributed to a more holistic approach in the second phase of the EUTF support, whilst the livelihoods evaluation played a key role in identifying more sustainable mechanisms to reinforce the income-related outcomes of these projects. The evaluation of the health sector has shown that interventions that are embedded in local primary health care structures and pursue a vision for capacity development and policy are more sustainable than others that focus solely on services for specific population groups or on improving infrastructure. This had a positive impact on the efficient and effective use of resources. Sector evaluations and ROM reports have been useful in identifying good practices, e.g., the EUTF final evaluation identified some lessons for the future that could be crucial for the design of a new cooperation instrument to address the still acute crisis in Syria and its neighbouring countries. ROM reports often included good practices that have also improved the depth of results reporting.

**Improved EUTF Syria decision-making process:**

Overall, the EUTF's M&E system has been crucial to the decision-making process at Trust Fund and project level. The ROM reports have proved useful in aligning the management decisions of operational managers in the EU delegations. In many cases, operational managers have limited time to monitor and control their portfolio, so these ROM missions fulfil an important task that improves their daily project follow-up. ROM reports are also useful for the EUTF management team, who are also responsible for authorising project extensions. The recent EUTF final evaluation emphasised that operational managers in EU Delegations 'greatly appreciated the high level of resources allocated to ROM missions and portfolio assessments, which provided them with a significant amount of informative data that they used to modify their approaches and refine their intervention strategy'.

**Increased articulation to communication and improved visibility of results:**

Especially during the second EUTF M&E phase, the M&E system fostered a close cooperation with the EUTF communication team. The EUTF communication has regularly used the results of the M&E database for communication products, such as short factsheets, events or other audio-visual materials produced as part of the EUTF communication strategy. The results of the various evaluations and ROM reports have strengthened the EUTF communication strategy by identifying good practices. Collectively these have helped to shape the communication missions and supported the selection of good practices to produce high quality audio-visual material and testimonies. The EUTF Syria communications team also utilised EUTF data to produce communication factsheets, all of which were made publicly available on the EUTF website. In addition, all results were published in the AKVO RSR platform, which

informed the broader public about the EUTF and its projects in terms of characteristics, results and geographical location.

**Contribution to accountability and transparency:**

Results reporting provided an aggregated analysis of EUTF achievements by sector and country, produced via a regular schedule and consistently shared with donors, EUTF stakeholders and the wider public. A summary of the findings of the ROM report as well as all evaluations and the regional education study - all of which are publicly available on the website - have helped to improve the accountability and transparency of EUTF actions, scope and results. The EUTF Syria Operational Board has been provided with project and EUTF level updates each year.

**Contribution to high level of EUTF financial implementation:**

Regarding the impact of the EUTF M&E system in place, it can be confirmed, as stated above, that it has not only contributed to improving decision-making at project level but has also had a positive impact at EUTF level. Indirectly, the high financial implementation of the EUTF (98% in 12/24) may have been positively influenced by the effectiveness of the EUTF Syria M&E system.

**Inspiration for other EU Trust Funds:**

The well-established and effective EUTF Syria M&E system has attracted interest from other EU Trust Funds, which have sought insights into its structure and functioning. The experience of EUTF Syria could also serve as a model for shaping future EU cooperation strategies with Syria.



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## LESSONS LEARNED FROM EUTF SYRIA M&E



The following lessons derived from years of experience with the EUTF Syria M&E system may serve as a source of inspiration for shaping future EU M&E system requirements in similar contexts.

#### **Designing of M&E and financing instrument at the same time:**

The design of a future financing instrument and its overall intervention logic should take place at the same time as the establishment of the accompanying M&E system. The M&E system can immediately help to adjust the intervention logic in a coherent way - as a cascade-based logframe system - and will be helpful in defining specific and measurable indicators. Institutional results can be included more easily from the outset. Aggregation will be easier. It is essential to allocate adequate time early on to reach agreement with implementing partners on their logical frameworks and ensure their alignment with the overall results framework from the outset. Although it would be desirable to set up fully compatible M&E systems at Trust Fund and project level, this does not seem realistic given a context with very different implementing partners, small NGOs, large NGOs, government partners or UN organisations. More importantly, the overall guiding results framework needs to be clear so that implementing partners can easily share the information they need, and their system is not additionally burdened.

#### **Built-in flexibility of M&E system:**

The established three-components M&E system approach is remains relevant for similar future interventions as it has demonstrated flexibility and adaptability in a highly challenging operational context. All three components - Data Analysis, ROM and Evaluation - have demonstrated the importance of incorporating flexibility for innovation and adaptation in response to evolving needs.

#### **Early engagement with implementing partners:**

The earlier the dialogue with implementing partners begins, the easier it will be to jointly define quantitative and qualitative indicators, and address challenges such as double-counting. The KPIs need to be defined precisely without the risk of double counting if aggregation is required.

#### **Built-in outcome orientation in the M&E system:**

In terms of outcome-orientation, the M&E system has gained valuable insights through piloting the Outcome Harvesting approach. The EUTF Syria final evaluation also emphasised the importance of measuring outcomes, not only at EUTF level but also among implementing partners. For future M&E systems, outcome and impact definitions should be guided by a well-structured development process. Rather than focusing solely on macro-level socio-economic indicators, emphasis can be placed on changes at the individual, community and/or institutional level. This shift might require additional resources at Trust Fund and project level given that M&E systems have traditionally focused on outputs.

#### **Learning as part of the M&E system:**

The learning dimension of the M&E system is particularly important for medium-term financial instruments such as the EUTF Syria. There remains potential to strengthen this aspect further. Introducing a more structured learning mechanism within the regular reporting shared with implementing partners and/or a capacity building component on M&E and Learning (MEL) at local level could enhance learning from the outset. While some implementing partners may lack the resources to establish learning components independently, incorporating



local-capacity building efforts could significantly enhance project-level M&E. Dedicated training sessions, such as those organised primarily during the first phase of the EUTF Syria, may also be an alternative.

#### **Support to decision-making:**

The three-components M&E system has proved its worth in supporting the EUTF decision-making processes in terms of management and funding. It has not only served the EUTF Syria management team at headquarters, but also the EU delegations in the partner countries. Ensuring that the EU delegations were informed about the QINs and involved in decisions on ROMs and evaluations was a key aspect of this approach. This collaborative, triangular structure should be preserved and further reinforced.

#### **Support to communication:**

A strong collaboration between the EUTF Syria communication and M&E teams-including technical support, has proven effective in enhancing the communication strategy and increasing the visibility of results. Early cooperation is key to maximising the impact of communication efforts, as it reinforces transparency and accountability. Clearly communicating results also supports the connection between project outcomes and financial implementation.

#### **Knowledge sharing with other EU instruments:**

For any comparable mechanism in the future, fostering more systematic knowledge exchange among EU cooperation instruments could help refine approaches, strategies and tools. Drawing from the EUTF M&E experience, Trust Funds offers flexibility, adaptability and innovation that can inspire other financial instruments.

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