

Guidelines for the Monitoring System for Development-Related Changes (MERV)

Imprint

Date of publication	September 2013
Editor	Quality Assurance
Contact	qualitaetssicherung@deza.admin.ch
Valid as	September 2013
Language version	English

Guidelines for the Monitoring System for Development-Related Changes (MERV)

1. Preliminary Remark

The **update** of MERV guidelines aims at (i) strengthening the context monitoring of **Cooperation Strategies** (CS) and (ii) addressing more consistently issues of **fragility** within the obligatory monitoring of development related context changes. The relationship between MERV and contextual analysis, including scenarios, risk and security management as well as the links with cooperation strategies, result frameworks, monitoring system and annual reports will be strengthened. Main **changes** concern

- the categorization into three types of countries,
- the introduction of “humanitarian and development space” as additional but mandatory field of observation in high risk and fragile and conflict affected contexts ¹,
- and the merger of social, cultural and humanitarian conditions, and
- the introduction of the category of “performance level” for fields of observation ².

2. WHY – Aims of MERV

In most countries where it has programmes and projects, SDC operates on the basis of a **CS**. CS are based on a context analysis and related scenarios anticipating future developments and possible context changes.

While the result monitoring of the cooperation strategy is the basis for its (annual) effectiveness reporting at domain level the **MERV** is a regular monitoring tool for contextual changes which may lead to potential adaptation of the program.

3. WHAT – Fields of Observation

MERV is reported in a **template** (see [Annex 1](#)), that identifies trends in fields and sub-fields of observation and performance level in fields of observation (previously defined as domains and sub-domains). While political conditions and general framework, economic, social and humanitarian as well as security conditions are always fields of observation, Swiss Cooperation Offices (SCOs) are a) free to recognize additional fields of observation according to their interventions or programs, i.e. related to the CS, and b) SCOs are free to define / adjust sub-fields of fields of observation. In high risk and fragile and conflict affected contexts the humanitarian and development space will be an additional field of observation.

SCOs are free to identify relevant **elements** per **sub-field** of observation. They shall be withdrawn from geographical, political, economic and social as well as security and fragility related benchmarks of the context analysis and scenarios of the CS. A non exhaustive list ([Annex 2](#)) will be developed for guidance / food for thought in the coming months.

¹ This Field of Observation addresses additional elements that impact humanitarian and development space necessary for result achievement and management (for instance security of staff and partners, acceptance, access to projects, restrictions for monitoring or travelling).

² Information about changes - in order to be meaningful – always has to be complemented with information about the existing performance level. E.g. a deterioration in economic conditions may lead to another assessment or to a partially different assessment, if the deterioration is happening in the frame of a general good economic situation / performance.

Main element of the MERV is the definition of **main consequences and possible measures** for strategic and operational activities (political dialogue, strategic discussions, and portfolio, office as well as staff management).

An **executive summary** in the MERV shall give a management oriented overview on development-relevant changes.

4. WHO & HOW - Procedure

MERV contains an **assessment of the SCO**, i.e. **SCO's opinion** regarding development-relevant changes, based on relevant information, and their possible consequences and possible measures for strategic and operational activities. Preparing and discussing MERV should be undertaken as a team within SCO, including management, operational, finance and administration staff.

Collaboration with other sections/staff of the **Embassy** is important. MERV does not compete in any way with the embassy's political reporting activities.

5. To WHOM - Dissemination

Main conclusions of the MERV are to be integrated into SCO's **Annual report**. Containing an assessment and confidential information in sensitive situations, the whole MERV will not be disseminated. Upon request – especially in Type C countries (see below) – the MERV can be shared upon demand by Headquarters.

6. WHEN - Frequency

MERV is undertaken at **regular** intervals; frequency of application may vary, depending on the country. A distinction is made between three time periods:

- ◆ **Annual** – in which MERV is carried out in time for discussions about Annual reports – for countries with a low risk or potential for conflict, whose development evolves under relatively a stable framework > **type A: “low-risk countries”**
- ◆ **Bi-annual** – for fragile countries with a medium risk or potential for conflict, in which there are clear signs of a deepening of crises > **type B: “medium-risk countries”**
- ◆ **At minimum Quarterly and occasionally, based on events** – for fragile countries with a high risk or potential for conflict or countries that are actually affected by conflict the frequency of MERV is decided on a case by case approach (based on events), after consultation between the SCO and the Headquarters (division) > **type C: “high risk and fragile and conflict affected countries”**

Initial classification and possible later re-classification in another risk group are made on the basis of regular discussions following the frequency cycle of MERV.

Annex 1: MERV Template (published separately in the SDC FHB, Core area 3.1)

Annex 2: Possible elements to be analyzed in sub-fields (in preparation)