

Pledge for Change Accountability and Learning Mechanism (PALM)

November 2023

Introduction to the PALM

The Pledge for Change Accountability and Learning Mechanism (PALM), developed in collaboration with [RINGO as one of the change prototypes](#), aims to hold International Non-Governmental Organisations (INGOs) and donors accountable to the local and national Civil Society Organisations (CSOs) they support or partner with. The PALM aspires to provide a new paradigm for mutual accountability and collaborative learning in the sector. The mechanism is designed to **shift the accountability equation and redress power imbalances in the sector**. The progress and success of the model must be defined by, and accountability led by, actors in the Global South. As a RINGO prototype, the mechanism aimed to meet the following criteria:

1. Informed by cumulative experience and good practices in collective accountability
2. Informed by models of accountability originated and tested in the Global South
3. Co-designed with Global South activists, practitioners and local partners of INGOs
4. Housed and managed by an African organization, Adeso
5. Includes both third-party and peer-to-peer learning and accountability
6. Fit for purpose for a coalition that seeks to grow with new signatories

PALM is designed to measure progress of the INGO Signatories towards the three pledges that underpin the vision of Pledge for Change:

Pledge 1 – Equitable partnerships

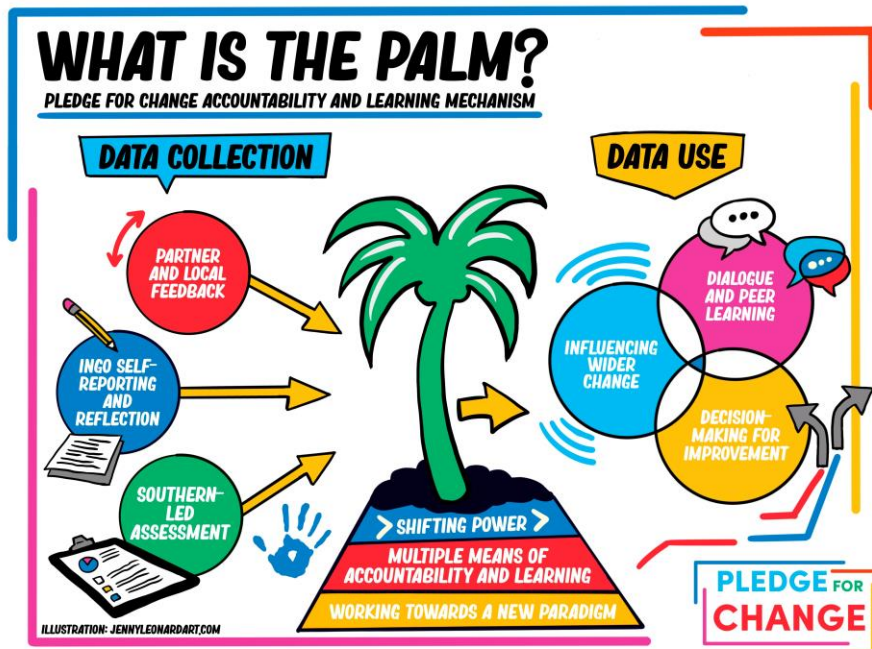
Pledge 2 – Authentic storytelling

Pledge 3 – Influencing wider change

Given the complex nature of the organizational and programmatic changes to be made by the INGO Signatories to achieve this vision, PALM suggests a diverse set of ways to monitor, measure and describe these changes as they relate specifically to the INGO signatories' policies and practice. PALM combines self-reporting by INGOs with assessments and reviews designed, managed and undertaken by Pledge Supporters and Southern-based agencies/organisations to help analyse the progress made by INGO Signatories on the three pledges. See diagram 1 below for an overview of the various data processes that PALM proposes to use for this approach, and how the data will be used.

Underpinning the choices made in the PALM are the following principles and values:

- Co-creation for a trust based and collaborative partnership
- Inspiring innovative ways of building a stronger aid eco-system
- Embedding values in the eco-system at large, as a way of influencing
- Non-traditional and non-hierarchical; promoting open ended involvement
- Prioritizing space for exchange and iterative learning



Principles of the PALM

One of the key aspirations of Pledge for Change is to inspire real change towards a stronger aid ecosystem based on the principles of **solidarity**, **humility**, **self-determination**, and **equality** by focusing on three core changes. These principles should shine through PALM as well, as the mechanism we will use to monitor and report on progress.

In addition, the PALM strives to apply a **decolonized approach** to data collection: We recognise that there are multiple different ways of knowing, and that there is a strong Euro-colonial influence currently on data management in the aid sector with a heavy emphasis on written and counted data. Understanding how power is experienced as part of measurement and accountability is central to creating a new paradigm. For this reason, the PALM is actively hoping to complement traditional data collection with other means of data analysis, such as videos, voice notes and audio recordings of people expressing their personal views, analysis of relationships and meetings, using examples and case studies etc. Pledge for Change will place an emphasis on using Southern-led values and expertise to design data collection methodologies, decide whose voices will be heard, and assess the data gathered in the different ways (see also under Data Collection below), to keep the balance of accountability with Southern-led perspectives. To provide a full picture of how change is happening, the PALM will apply a **mixed method approach** to data management:

- Quantitative metrics should allow for active and accurate analysis of whether INGOs have changed their policies and practices to meet the pledges. While quantitative data capture cannot stand on its own, it is important that there are concrete markers of progress to provide the confidence that the Pledge is changing organizational behaviour.
- Qualitative analysis of the perceptions of organisations that partner with Signatory INGOs is fundamental to assessing whether the changes made by Signatory INGOs are making a difference in terms of shifting power to local organisations. These perceptions can be gathered in

a number of different ways, recognizing that triangulation will strengthen the analysis, especially as the change sought by the pledge commitments cannot all be measured through quantitative indicators (for example around Authentic Storytelling).

Data Collection

The PALM allows Pledge for Change to ensure accountability via three main data collection processes:

1. Partner and local feedback

- a) Designed and implemented by the West Africa Civil Society Institute (WACSI), an independent partner survey will gather feedback from local, national, and other civil society organisations working with INGO Signatories in relation to their performance towards the three Pledge commitments.¹ As some signatories already have surveys they administer to partners, they may take some time to transition from their existing survey partner to a common survey used by Pledge Signatories. Signatories remain committed to ensuring that the accountability mechanism is led from the global south as part of our drive to decolonize knowledge through increased trust, transparency, and power sharing.
- b) Secondly, a longitudinal video filming a few key partners reporting over time about any changes they have seen in how their partner INGO is implementing the three Pledge commitments will also ensure local voices are holding the Signatories to account. This option is dependent on accessing specific funding.
- c) Thirdly, the Pledge will provide partners of Pledge Signatories an avenue to give feedback to the Signatory leadership, through an independent platform called Talk to Loop, at any time. This will give Pledge Signatories additional qualitative information in real time and anonymised. Using Talk to Loop will help to address power dynamics in the partnership process, giving partners choice and agency to raise their concerns, suggestions, or issues, thus helping to build trust and a commitment to listening by Signatories, and creating a channel for them to reply if appropriate. Aggregate, anonymised reporting of annual trends in the data will complement the other data sources monitoring progress on the three pledge².

2. INGO self-reporting and reflection

- a) Signatory INGOs will report on progress made and actions taken to advance the Pledge commitments. The initial Signatories have agreed a set of measurable metrics and will report against these on a rolling basis. Given differences in current strategies, focus, and data collection methods, Signatories will be able to choose which indicators to begin reporting against and will report against as many indicators as they can. Over time, the ambition is for all signatories to report on all indicators over the life of the Pledge (see page XX below for more details). As Signatories evolve their data collection methods as part of their Pledge engagement, we anticipate that this phased approach will lead to stronger, more harmonised reporting over the subsequent years of Pledge reporting.

¹ At present, several signatories are using the services of Keystone Accountability for an independent/3rd party survey mechanism or use their own. Some have asked Keystone team to add additional questions related to the pledge commitments to the 2023 survey.

² Loop is offering one year free use of their feedback mechanism, Talk to Loop, and the provision of an anonymized, aggregate analysis of reports coming in to contribute to the broader annual learning and partner survey findings.

- b) In addition, the Pledge secretariat will facilitate a discourse analysis of retreat agendas/minutes (retrospective and going forward) and other conversations between P4C and Signatories, to assess changes in organizational culture and intent. The discourse analysis can also be complemented by interviews and/or a written reflection about institutional culture change as part of the annual reporting, gathering evidenced examples of how INGOs have made changes, such as cultural shifts, strategic decisions, new policies, changes to organizational structure.

3. Southern-led assessment

- a) Pledge 2 is about authentic storytelling, so to assess whether Signatories are adhering to this pledge, an 'Authentic Storytelling Review Panel' will be put together from representatives of the Southern-led Pledge Supporters as well as from other civil society experts, who will conduct a (remunerated) audit of the 10 most seen/representative communications and fundraising products (see also Metric 2.2).
- b) The Global Advisory Group, which is made up of representatives of the Pledge Supporters together with key Southern-led eco-system leaders, will undertake an annual curated review conversation with the Signatories, to discuss the findings in the self-assessment report, partner surveys, communications product audits, creating a space for reflection and dialogue between Signatories and Supporters for genuine accountability and learning. This should also contribute to jointly identifying areas where signatories should focus their efforts in the following year.

Data Use

Data gathered through the means described above will be used for the following three purposes (see also Figure 1 above):

Dialogue and peer learning

The aspiration of Pledge for Change is to support Signatories on their journey towards **shifting the accountability equation and redressing power imbalances in the sector**. The intention is that by journeying together, this will be facilitated through mutual accountability and collaborative learning. Dialogue and peer learning informed by the evidence of culture and power shift (or lack thereof) will help Signatories move towards the desired goal. Enabling cross-learning from what worked in one or another of the Signatories should inspire change in the other Signatories and potentially the Supporters also, thus providing models for eco-systemic change. The bulk of the dialogue and peer learning will be facilitated through the four working groups. Additionally, virtual and in-person retreats provide opportunities for exchanging ideas, promising practices, and for dialogue between Signatories and Supporters.

Decision-making for improvement

Having access to information about progress against some of the key metrics central to the Pledge commitments and goals will enable each Signatory to **assess** what is working, **course correct** on those issues not seeing progress, and **reallocate resources** to ensure best outcomes can be achieved. The four working groups will offer an opportunity for Signatories to update peers on how they are making course corrections and putting in place changes in their decision-making and internal processes).

Influencing wider change

Knowledge of what has worked within the realm of the Pledge to shift power in aid relationships, and how progress has been made, will provide evidence needed for wider advocacy initiatives as defined by Pledge 3 – Influencing wider change. The importance of going beyond anecdotal or aspirational

examples, and being able to use hard numbers and solid examples, cannot be underestimated when it comes to **evidence-based advocacy**.

Annex 1: INGO Self-Reporting – Process and Format

INGO self-reporting is an important part of the Pledge being able to evidence that the initiative is working. However, the signatories of the Pledge are a set of very different organisations, with different structures, financial years, and reporting abilities. In order to start the journey of accountability in 2024, we are proposing the following parameters for Signatory reporting:

- 1) Reporting takes place on an annual rolling basis, whereby each organization commits to submitting a report during 2024, at a time which best aligns with their internal financial year and reporting processes. Once each Signatory has committed to a reporting deadline, the Pledge secretariat and the CEO of the Signatory organisation, will hold their teams to account to report in line with their commitment. The first annual report will at the same time be each organisation's baseline.
- 2) Each organization will make a commitment to report on as many of the Pledge metrics as they can, but to at least provide a progress report on five common metrics (see table of metrics below).³ Each organization commits to increasing the number of metrics each year, and will chart their own progress against the metrics, comparing progress against their own baseline rather than to other Signatories. The level of progress, rather than the actual achievement of targets, will be summarized in the report across all signatories and will enable an analysis of the Pledge process's effectiveness. This will then be triangulated with the partner survey results.
- 3) The report will account for progress made against the three pledges (Equitable Partnerships, Authentic Storytelling, and Influencing Wider Change). There will be:
 - a. A quantitative report, using 17 different metrics, which were inspired by the founding Signatories and Supporters of the Pledge, co-developed by Signatories, and validated by the Global Advisory Group.
 - b. A qualitative report, in the form of a written summary by each Signatory of progress made on the three pledges in the past year about institutional culture change, gathering evidenced examples of how INGOs have made cultural shifts, strategic decisions, new policies, changes to organizational structure, etc. This information will also be brought into and inform the discourse analysis as mentioned above.
- 4) The Pledge secretariat, together with the MEAL Sub-Group, will collaborate to analyse Signatory reports and write up one joint Pledge annual report. Though Signatories can choose their reporting timeline, the deadline for reporting on 2024 will be September, so that the annual report can be presented at the November Retreat. The timing of this work will be dependent on the individual reporting deadlines committed to by the Signatories and may mean that not all Signatories will be included in the first report.

Table 1 below summarises the full set of metrics as agreed in 2023 through a joint MEAL process in 2022 and 2023. After an analysis to identify which metrics can be reported on by all the Signatories, five metrics were chosen to form the basis of common reporting, to be used by all Signatories in their 2024 report. Signatories also commit to reporting on the extent to which they are making progress on the other metrics, using a progress scale and explaining their response in the report – this may include providing progress on similar indicators used in current Signatories systems but which are not directly

³ These five metrics have been identified as those that Signatories can currently monitor, using data management systems they have in place. The annual report will also provide an opportunity for Signatories to indicate any progress made on the other metrics.

comparable with the Pledge metrics, and it may in future reporting years also include reporting against agreed targets.

Table 1 below sets out the agreed metrics that will form the basis of a reporting template for the Pledge. The metrics include reporting on progress from partner surveys, Signatory self-reporting, and Pledge 2 Expert Review Panel analysis. To the extent possible, reporting requirements of two other related localization processes which some Pledge Signatories are also reporting on, namely the Grand Bargain and the Charter for Change, have been taken into account in the formulation of the Pledge metrics to harmonise these reporting processes and to minimize redundancies.

Table 1: Pledge for Change Metrics as agreed in 2023, to form the basis for annual reporting.

Pledge for Change 2024 Baseline Self-Reporting		
Indicator	Purpose of indicator⁴	Data Source
Pledge 1: Equitable Partnerships		
1.1 Partner perceptions of partnership: % of local partners surveyed who consider their partnerships with Pledge for Change signatories to be equitable	Ensure partner perceptions and voices are at the centre of our systems to determine if P4C signatories are living up to the commitment to partnership in project delivery	Partner survey (WACSI/Keystone /Internal/Other)
1.2 Level of partnership: % of projects where more than 50% of the total project budget went to a local partner or a consortium of local partners	Determine if P4C Signatories are shifting away from direct delivery and to "equitable partnership as their default approach"	Self-reporting from project management information
1.3 Diversity of partnerships: % and # of local partners that are representative of affected communities, such as women's rights organizations (WRO) or women-led organizations (WLO), or social movements, refugee-led organizations, women and LGBTQI - led, or organizations of people with disabilities	Determine if P4C Signatories are supporting a more "resilient, independent and diverse civil society" through working with local partners that are representative of traditionally excluded groups	Self-reporting from project management information
1.4 Level of funding for partnerships: % of global funding shared with local partners (disaggregated by types of partner)	Determine whether the overall INGO model is changing, as part of the shift in aid architecture, i.e. is their business and operational model changing	Self-reporting from organisational finance information
1.5 Fair share of administrative costs: % of formal partnership agreements providing a fair share of ICR or administrative costs (at least the minimum allowed by the donor, and ideally an amount considered fair by the partner)	Determine whether INGOs are "sharing" the burden of costs in ways that will make our partners stronger and more sustainable".	Self-reporting from organisational finance information
1.6 Support for organizational development: % of partnership or funding agreements that incorporate core and/or flexible funding	Determine whether INGOs are "allocating more resources to help national and local organizations take the lead".	Self-reporting from project management information
1.7 Decision-making: % of projects or initiatives where the design is partner-led or co-created	Determine the extent to which partners have a say in project delivery – what and how.	Self-reporting from project management information

⁴ Text in quotes refers to the commitments made in the 3 pledges of the movement: [Pledge for Change – | Home \(pledgeforchange2030.org\)](https://pledgeforchange2030.org)

Pledge 2: Authentic Storytelling		
2.1 Partner perceptions of communications: % of local partners surveyed satisfied with INGO communication materials and feeling they are given rightful credit for their work	Ensure partners perspectives on INGO practice on authentic storytelling is “showing the actions led by local communities both during a crisis and as they recover, and the impact made by local organisations”.	Partner survey (WACSI/Keystone /Internal/Other)
2.2 Ethical communication: Proportion of INGO written and visual communications which are considered ethical, inclusive, mention local partner contribution, and avoid reinforcing harmful stereotypes based on agreed standards	Determine whether communications practice in INGOs “reflect our commitments to anti-racism, locally led initiatives, gender equality and equitable partnerships”, particularly “avoiding exploitative imagery that portrays people as helpless victims”	Authentic Storytelling Review Panel southern-led 'audit'
2.3 Creating space for local voices: % of speaking opportunities, and media, social and fundraising communications that facilitate direct engagement of local partners from global South	Determine whether INGOs are “amplifying the stories people want to tell rather than merely speaking on their behalf.”	Self-reporting from communications tracking systems
2.4 Engaging talent for content production: Proportion of communications content developed, led or produced by local talent	Determine to what extent communications are “preserving the authenticity of a story all the way through our editorial process, from the gathering of words and pictures to editing, production and publication”.	Self-reporting from communications tracking systems
2.5 Visibility and recognition to local partners: Evidence of cases of public communications on programs that showcase/acknowledge local partners' work	Determine whether INGOs are “giving credit to partners where it’s due”.	Self-reporting from an analysis of annual reports and other major public communications
Pledge 3: Influencing Wider Change		
3.1 Partner perceptions of communications: % of local partners surveyed reporting positive shifts in NGO commitment to shift power to local actors	Ensure partners view on whether there is a recognizable shift in the commitment of INGOs to challenge “the way we work and how we’re going to do it”.	Partner survey (WACSI/Keystone /Internal/Other)
3.2 Collective advocacy for equitable, locally led and anti-racist approaches to aid and development: Measurable outcomes from collective advocacy for equitable, locally led and anti-racist approaches to aid and development and other interrelated government policies (eg. trade, foreign policy)	Determine if P4C Signatories are working together to “argue for these changes to be made across the aid and development sector” . ^[66]	Self-reporting from advocacy tracking systems
3.3 Influencing donors and philanthropic community: Evidence of cases where INGOs and partners have contributed to influencing policies/mechanisms/budgets/ etc. that enable equality in resource allocation to local partner organizations	Track and report on the extent that INGOs are “speaking out against any government policies or international action that perpetuates a colonial approach to aid and development”.	Self-reporting from communications tracking systems
3.4 Elevating local leadership: Evidence of local/national/regional actors leading advocacy initiatives, with INGO Pledge Signatories playing facilitating, convening or supporting roles	Determine whether INGOs are “creating opportunities for Global South leaders to lead conversations and advocate for change in public platforms”.	Self-reporting from communications tracking systems
3.5 Pledge signatories' accountability: # of Pledge for Change signatory INGOs participating in joint annual reporting, learning and	Determine whether INGOs are “track our progress in implementing the Pledge for Change 2030 and report it publicly to show	Pledge for Change MEAL Working Group

accountability processes, with peers and with partners

staff, supporters, partners, and the global aid system that we're 'walking the talk'".

Annex 2: Partner and local feedback – Process and Format

Partner survey

Led by and implemented by the West Africa Civil Society Institute WACSI, the partner survey will gather feedback from local, national and civil society organisations who are working with INGO signatories in relation to their performance against the three pledges. Up to 12 of the signatories will participate and provide contact details of a sample of their partners.⁵

This partner survey seeks to build trust and opportunities for honest and frank feedback from global south and civil society partners to INGO signatories, as part of improving the quality of their partnerships, their implementation, the outcomes for the communities and their progress against Pledge commitments.

Period	Activity	Description	Deliverables
November 2023	Planning and scoping	Defining the scope, timelines, resources for fundraising and contracting	Clear timelines Budget allocation Contract
November 2023		Reviewing signatory's metrics Identifying and mapping signatory's partners	Define metrics for assessment Database of signatory's partners
December-January 2023	Literature review and development of instrument	WACSI led partner feedback survey tool development (with a round of review and feedback from MEAL WG and GS Advisors), a test of the survey and final survey ready for use in 2024	Review previous partners survey data Develop survey tool Quality control of survey tool
February -March 2024	Data collecting and processing	WACSI administers partner feedback	Data collection and process
April 2024	Analysis	Statistical analysis of the survey	Analysis and start report writing
May-June 2024	Reporting and Validation	Presentation of initial findings from the survey at the PFC retreat	Share preliminary feedback Validation of data collected
July 2024	Final reporting	First draft reporting writing	First draft of report
August 2024		Translation of report and sharing the report with signatories	Final report Debrief meeting with signatories

Longitudinal video

⁵ At present, a number of INGOs are also working with Keystone or their own survey mechanisms and over time we will explore the possibility of integrating these methodologies to ensure that they are homed in the global south as part of our drive to decolonize knowledge through increased trust, transparency and power sharing.

A compilation of video testimonies from a sample of partner organizations about their experiences and observed change is planned, to serve as complementary to the annual independent partner surveys and providing non-traditional alternatives to quantitative indicators/written reports. The video will feature partner leaders from each region who are willing to provide honest feedback on video and will provide a record of achievements over time.

Two options are proposed - with budget implications:

Bi-annual (Q1 and Q3) collection of self-recorded videos captured independently using phones/computers and edited by a multi-media consultant (requires payment for consultant time two times/year).

Annual recorded interview and site visits of a sample of partners, done by local videographers/producers in select countries - supports a Pledge 2 approach and contributes to a database of local talent (Pledge 2 related goal). This may require a larger budget (for several videography consultants and production time) and will produce a higher-quality product.

Feedback mechanism

Pledge is currently exploring options to also include a feedback mechanism that will ensure that unsolicited feedback from partners is encouraged and used to triangulate with other data collected over time. Conversations have been initiated with Loop, who have developed an independent feedback mechanism called [Talk to Loop](#) that can be used by any actors in the humanitarian and development sectors, to collect and manage feedback, whether anonymous or not, as needed. The Pledge for Change Signatories can receive this feedback in a way that would support accountability and learning and would reduce barriers to feeding back including languages, power dynamics etc. It would mean that feedback can be collected on an ongoing basis throughout the year, and not just from the partner organisations sampled for the WACSI survey.

Using [Talk to Loop](#) will help to address power dynamics in the partnership process if the national partners feel that would be helpful for them. It will enable partners to self-initiate feedback in languages and through channels that suit them, anonymously or openly. The leadership will receive these directly and any sensitive information will be managed through safe confidential pathways. Pledge signatories can respond in their preferred language or ask to engage directly. The data would be managed confidentially and not be shared with the wider assessment team. Data is stored in compliance with GDPR.

Modalities of collaboration need to be discussed, but Loop has already indicated their willingness to ensure that the collaboration with Pledge for Change can start off without a specific funding contribution, i.e. on the free-to-use platform.

Annex 3: Southern-led assessment – Process and Format

Authentic Storytelling Review Panel

One of the Pledge Metrics (see Table 1 in Annex 1 above) is **2.2: Proportion of INGO written and visual communications that are considered ethical, inclusive, mention local partner contribution, and avoid reinforcing harmful stereotypes based on agreed standards** supported by Pledge 2 working group. This metric is best monitored by a Southern-led group, who is best placed to decide what are the agreed standards for communications that are “ethical, inclusive, mentions local partner contribution and does not reinforce harmful stereotypes”.

The plan is for an annual Southern-led (and remunerated) audit of the 10 most viewed/representative communications and/or fund-raising pieces from each INGO Signatory, with recommendations for improvements where the agreed standards have not been met or only partially met.

For this purpose, the Pledge Secretariat will recruit a small group of experts in Communications, made up of a mix of Supporter representatives and other Southern experts in communications/ decolonizing images/narratives/storytelling.⁶ Issues of honorarium and costs will need to be addressed, once a budget has been established for this initiative.

Global Advisory Board

The Pledge Secretariat will also support an annually rotating group of Global South CSO leaders (most likely drawn from Supporters group, but perhaps also beyond). In the first year this might include those Global South leaders who participated in the draft Pledge feedback process and accountability mechanism development conversations earlier in 2022.

Responsibilities:

- Meet as a group twice a year to prepare for contributions to the bi-annual retreats (November and March/April)
- In September/October of each year, review data gathered against the Pledge metrics, as presented in a summary report prepared by the Pledge Secretariat, including
 - data from the annual self-reported submissions by Signatories,
 - the partner survey and
 - the Authentic Storytelling audit,to review progress and provide feedback to Signatories during the November retreat.
- During the retreats and Steering Group meetings lead a dialogue of learning around progress as captured through the metrics of the Pledge, and any other data on progress
- Provide input into defining metric language (e.g. “fair share of costs” “equitable”, “ethical storytelling”), and support PALM processes roll out
- Suggest communications colleagues from their organizations or other Global South organizations and communication firms to serve on the **Authentic Storytelling Review Panel** that will in Q4 review

⁶ Pledge Secretariate has made initial approaches to Africa No Filter, No White Saviors, Taye Balogun, Tara Todras-Whitehill, but there is scope to grow this group so that the burden of work can be shared better.

10 most viewed comms/fundraising materials from each Signatory and give direct feedback (part of the proposed metrics).

- Act as Pledge ambassadors with other Global South colleagues, recommending their engagement as Pledge Supporters, as rotating members of the Global Advisory Group, etc.

Estimated Time of Effort: 4 hours/quarter, 8 hours/quarter Q3 during reporting review

Budget includes honorariums for their time and travel costs for retreat attendance.