SRF
SAHEL REGIONAL FUND

Scoping note.

SRF's strategic learning mechanism for its partners

Strategic leverage to strengthen impact and manage change

Strategic and contractual framework

April 2025

SAHEL REGIONAL FUND

1. Why a structured learning system?

The SRF has positioned itself as a strategic, agile and well-established fund that relies on continuous learning to enhance the quality of its work and help transform practices in the sector. Learning is therefore seen as a cross-cutting lever, integrated into all of the Fund's dynamics.

It is not limited to monitoring projects in the field or analysing their immediate results. The ambition is broader: learning extends to all levels of SRF intervention, from internal processes to partnership and institutional dynamics. It also aims to produce cross-cutting and strategic analyses of certain key issues, with a view to contributing to collective reflection and to the development of humanitarian practices in the region.

In other words, the learning process does not simply observe what is being done: it seeks to draw meaning, lessons and levers for action from it, to feed into the SRF's decisions, strengthen its partners, and feed into the wider debates on the quality, location and transformation of the system.

2. SRF's Theory of Change at the heart of learning

The SRF's learning system is directly rooted in its theory of change, which guides the Fund's action through four complementary axes. Each of these areas does not have the same function in terms of producing or using learning: some are sources of learning, others are vectors or levers for amplifying it.

Area 1 - Quality funding. This is a central learning area. The SRF is developing a qualitative approach to funding that deserves to be documented: what are the effects on NGO practices? What impact has it had on the quality of the responses provided to populations? What adjustments need to be made to support methods or criteria?

Area 2 - Localisation. The issue of localisation also calls for the active production of learning. By increasing the funding available to local CSOs, either directly or via strategic partnerships, the SRF is initiating a process that needs to be analysed in terms of its effects on the structuring, influence and legitimacy of these players. In this case, learning makes it possible to objectivise progress, identify levers and provide better support for this structural change.

Area 3 - Catalytic function. It does not in itself generate new learning, but provides a forum for enhancing, sharing and influencing the learning generated in Areas 1 and 2. The ambition is to feed regional efforts to coordinate, align and collectively transform through a better circulation of knowledge and useful practices.

Axis 4 - Contributing to the transformation of the humanitarian system. Axis 4 does not directly produce learning, but it represents the strategic framework within which SRF's learning takes on its full meaning. By capitalising on concrete experiences and making them visible, the SRF seeks to positively

influence the practices of donors, partners and coordination bodies, with a view to contributing to the reform of the humanitarian system.

3. An integrated, structured and action-oriented system

To be useful, learning cannot be a theoretical or one-off exercise. The SRF adopts an integrated, structured and actionable approach to learning, designed as a tool for continuous improvement, strategic steering and collective transformation, **both for the FMU and for the projects it funds.**

Three principles guide the implementation of the scheme:

- **Continuous learning, rooted in reality.** Learning is based first and foremost on practical experience gained from funded projects and their follow-up: operational implementation, partnership dynamics, reporting, evaluations and feedback. It is closely linked to the various phases of the project cycle, from appraisal to closure. It also draws on critical reflections, interim reviews and external analyses (such as Mid-Term Evaluation or Third Party Monitoring), as well as any practices deemed relevant.

- **A clear structure and strategic vision.** The system is neither opportunistic nor fragmented: it is organised around **annual priorities defined by the FMU** for the whole of the SRF (including its partners within the framework of its contracts), in conjunction with the SRF's ToC. These priorities are updated over time to incorporate the Fund's emerging needs, feedback from the field and changes in the regional context.

- **Learning geared towards use.** Learning is only valuable if it is used. The SRF ensures that the results of its analyses **can be used to adjust practices**, **feed into strategic decisions** and **strengthen partners**. The aim is to produce practical, usable knowledge that can be disseminated in a way that is adapted to different audiences - internal, partners and external stakeholders.

4. A clear organisation for a structuring and progressive system

The SRF's learning system is based on a **coherent architecture** designed to produce useful, value-adding lessons rooted in the collective experience of the projects funded.

- **Strategic steering by the FMU**. The Fund Management Unit coordinates the entire system. It defines the annual priorities, supervises **the collective strategic studies** (carried out by external partners), organises the annual scoping meeting, and ensures that learning is properly integrated into the Fund's governance and tools.

- **Three types of contribution are expected <u>from funded projects</u>**

    1. **Contribution to collective strategic studies (led by the FMU)** Each year, one or two **collective strategic studies** are carried out on themes of common interest to all the projects. These studies are entrusted to an external partner selected by the FMU. The partner NGOs do not carry out these analyses directly, but are required to **facilitate the collection of data** (quantitative and qualitative) according to the needs expressed, and to take part in interviews or targeted feedback.
    2. **Production of a publishable project study (for international consortia only).** Each consortium led by an international NGO must produce **a publishable project study each year**, based on its implementation experience. The theme is defined in consultation with the other partners at the annual meeting, and must be linked to the SRF theory of change (axes, strategies, expected effects) but may opportunely touch on programmatic aspects. The study must be structured, analysed and **publishable**, with a view to external capitalisation.
    3. **An annual programmatic review (for all projects funded by international consortia + localisation window projects)**. All partners - whether members of an international consortium or directly funded local entities - must conduct an annual **programmatic review**, in the form of an **After Action Review**. These exercises are carried out **autonomously by the projects**, without systematic involvement of the FMU. When a point of collective interest is identified (by the review or by FMU monitoring), it can be shared at the annual meeting.

- **A structuring annual framework: the annual meeting in December/January.** This meeting is the high point in the coordination of the learning process. It provides an opportunity to present the results of the collective strategic studies, report on the project studies that may be published by the international consortia, share any feedback from the programmatic reviews, pool the themes of interest identified during the year, and set the framework for the learning to be produced for the following year.
As some projects do not coincide entirely with the calendar year, a flexible approach is adopted for their participation: a programmatic review is still expected, but the other contributions can be adapted according to the state of progress of the project. The aim is to ensure a coherent collective dynamic, without increasing the burden on partners at the beginning or end of the cycle.

- **Designated focal points to structure the learning dynamic** To ensure the continuity and quality of contributions, **each consortium** must designate a **MEAL / learning focal point**, as well as **identified relays in each partner or project strand**. These people are responsible for coordinating the learning exercises, ensuring that data is properly transmitted, and ensuring that the system is anchored in operational implementation.

- **Resources to be provided within the projects to ensure the system is implemented**. Projects must **include dedicated budget lines** to cover learning and capitalisation activities, within the MEAL budget lines. These are **mainly carried out internally** (mobilisation of project

teams, coordination time, reporting), but it should also be possible, **where appropriate, to contract external consultants on an ad hoc basis** to support the conduct of a study, lead a programme review or produce a structured analysis.

5. Priority themes for collective strategic studies and publishable project studies.

Axis 1 - Quality Funding

Qualitative funding to build NGO capacity and improve the quality of the humanitarian response

1. **Effects of quality fundings on the capacities of beneficiary NGOs**. To what extent do so-called "quality" funding arrangements - i.e. those characterised by their flexibility, predictability over time and ability to adapt to changes in context - help to strengthen the institutional, technical and strategic capacity of beneficiary NGOs, particularly in fragile or unstable contexts?

2. **Definition, implementation and effects of Nexus emergency/recovery/resilience approaches**. How are Nexus approaches understood and implemented at project level? What concrete links are established between the emergency, recovery and resilience components? Under what conditions do these approaches enable an appropriate response to both immediate needs and structural dynamics? What are the effects on beneficiaries and on the efficiency of interventions?

3. **Definition and analysis of integrated area-based approaches.** What is a coherent and integrated area-based approach in humanitarian contexts? What criteria are used to identify such approaches (geographical targeting, local coordination, multi-sector continuity, etc.)? To what extent have these approaches been implemented to date, and with what observable results? Are they relevant, equitable and efficient in terms of local needs?

4. **Definition and effects of people-centred approaches**. How are people-centred approaches reflected in multi-sectoral or regional projects? What are their effects in terms of the relevance of the response and the personalisation of support, but also in terms of equity (threshold effect, relative exclusion) and efficiency (intensity of resources mobilised per beneficiary)?

5. **Relevance and feasibility of interventions in hard-to-reach areas** What are the operational and programmatic criteria defining a 'hard-to-reach' area? What are the specific constraints (security, logistics, local governance) and the strategies implemented to intervene in these areas? Are these projects relevant and justifiable in terms of the effort required, and do they have a differentiated impact on the local population?

6. **Environmental resilience actions: relevance and impact.** What actions to preserve or enhance the environment are implemented in the projects? In which contexts are they most

relevant, and how do they combine ecological resilience with productive benefits for local communities?

7. **Feasibility and added value of cross-border projects.**
   To what extent do cross-border projects enable a better response to regional crisis dynamics (human mobility, conflicts, markets, protection)? What are the conditions necessary for their feasibility (administrative coordination, harmonisation of standards, logistics) and their specific effects in terms of complementarity or coverage?

8. **Effects of the approaches studied on the quality of the aid provided.**
   To what extent do the different approaches analysed - quality funding, Nexus approach, area-based approach, people-centred approach, interventions in hard-to-reach areas, cross-border interventions - contribute to concrete improvements in the quality of the aid provided (relevance, effectiveness, coherence, continuity, beneficiary satisfaction)? What compromises or trade-offs do these approaches imply in terms of coverage, equity or operational feasibility?

Axis 2 - Location

Appropriate methods for strengthening, structuring and legitimising local CSOs

1. **Effects of direct funding on the institutional strengthening of local CSOs**
   What practical changes (organisational, technical, financial, governance) can direct funding bring about within local CSOs? What success factors or obstacles have been identified in strengthening beneficiary structures in the short and medium term?

2. **Capacity building as part of indirect funding (via INGO partners)**. What forms of capacity building are implemented by INGOs with their local partners as part of indirect funding (training, technical support, strategic support, governance, etc.)? Does this capacity-building primarily aim to improve the quality of the projects implemented, or does it enable **sustainable structural strengthening of** local CSOs (autonomy, management, governance, diversification)? How effective are these measures in the medium term? Under what conditions do they enable an increase in institutional competence rather than a simple adjustment to contractual requirements?

3. **Structuring trajectories of local CSOs in fragile contexts**.
   How are the local CSOs funded evolving (professionalisation, sector specialisation, geographical coverage, partnerships, etc.)? What trajectories are observed depending on the type of support, level of maturity or institutional context?

4. **Recognition and positioning of local CSOs in coordination mechanisms**. To what extent do funded local CSOs participate in humanitarian coordination or multi-sectoral response mechanisms? What are the obstacles (formal, informal, linguistic, political) to their full

recognition? What strategies are effective in increasing their influence and legitimacy in these areas?

5. **The role of local CSOs in community and territorial dynamics.** What relationships do local CSOs have with communities, local authorities and non-state actors? To what extent does their local anchoring facilitate access, relevance or sustainability of interventions? Conversely, what tensions or limitations might this position create?

6. **Structural limitations to localisation in the Sahel?** What are the systemic obstacles to the effective implementation of localisation in Sahelian contexts (regulatory environment, financial dependence, procurement systems, risk management, institutional recognition)? What funding, support and advocacy methods can help overcome some of these obstacles?

7. **Conditions for implementing an equitable partnership between international NGOs and local CSOs**. What practices encourage balanced partnerships in terms of sharing responsibilities, strategic steering, visibility and skills transfer? Under what conditions do mixed consortia enable local partners to be genuinely strengthened, more widely recognised and given greater leadership?

Area 3 - Catalytic function

Produce structuring effects for a more coordinated, complementary and strategic response

This area does not involve any specific learning, but is based on the **collective use of lessons learned from projects**, particularly in relation to areas 1 and 2. The aim is to **circulate, structure and mobilise this learning** in order to strengthen the coherence of the responses and provide input for the **humanitarian regional strategic frameworks**, such as the regional clusters or inter-agency working groups.

Area 4 - System transformation

Contributing to changes in humanitarian practice and funding reform

Axis 4 does not directly generate learning, but relies on **the Fund's ability to demonstrate, by example,** more appropriate, localised and qualitative funding methods. The lessons learned from projects can be used for **advocacy purposes**, to contribute to discussions on reforming the humanitarian system and implementing international commitments (Grand Bargain, localisation, Nexus, etc.).

6. Contractual monitoring and accountability

Active participation in the SRF's strategic learning process is a contractual commitment for all funded projects. It will be integrated into the overall monitoring of implementation, through the usual steering tools (reports, monitoring exchanges, project reviews).

To ensure that the partners are effectively mobilised, a number of **process indicators** will be monitored throughout the cycle:

Monitoring indicators	Frequency	Verification procedures
Appointment of a learning / MEAL focal point	At the start of the project	Notification to the FMU, contact sheet or organisation chart
Integration of a budget line dedicated to apprenticeships	Initial	Project budget review
Contribution to a collective strategic study (if requested)	Annual	Proof of participation (interviews, data sharing, etc.)
Carrying out a project capitalisation study (INGOs only)	Annual	Study validated and transmitted
Annual programme review (all projects)	Annual	Review report or AAR summary sent
Participation in the annual learning meeting	Annual	Attendance list, active contribution to discussions
Compliance with the timetable defined at the start of the project	Regular / quarterly monitoring	Progress planning, internal FMU dashboard

These indicators are not assessed on the basis of the quality of the products themselves, but on the **actual implementation of the expected contributions**, in accordance with the commitments made.

In addition, **only one specific indicator needs to be included in the logical framework as part of the cross-cutting indicators:**

Indicator: Number of learning products generated during project implementation.

The target will be determined on the basis of the duration of the project and its seasonal nature, in accordance with the principles of flexibility described in this framework note.

Appendix 1. Project checklist - Expected contributions to SRF's strategic learning system

Element	Mandatory	Senior manager	Frequency / time	Comments
Appointment of a learning / MEAL focal point	☑ Yes	Lead NGO and local partners	At the start of the project	Single focal point per consortium + one relay per partner/component
Integration of dedicated budget lines	☑ Yes	Lead NGO	Budget design	Allow for staff time, external support if necessary
Contribution to a collective strategic study	☑ Yes	All funded projects	According to FMU planning	Providing data, taking part in interviews, etc.
Project capitalisation study (INGO)	☑ Yes (INGO)	Leading international NGO	Once a year	Free or collectively chosen subject; publishable study
Annual programme review	☑ Yes	All projects (INGOs + NGOs)	Once a year (often in October)	Flexible format (After Action Review); autonomous, without systematic FMU involvement
Participation in the annual learning meeting	☑ Yes	Lead NGO	December / January	Presentation of results and prioritisation for the following year
Monitoring the project learning plan	☑ Yes	MEAL / apprenticeship focal point	Throughout the cycle	Ensuring deadlines are met

Appendix 2. Standard annual calendar for the apprenticeship scheme - SRF

Period	Main activities	Managers
Project duration	◆ Designation of **learning / MEAL focal points** in each consortium and with each partner ◆ Inclusion of budget lines dedicated to learning activities, including the possibility of using external expertise if necessary	NGO project leaders and partners
December - January	◆ **Annual meeting** for strategic discussion and framing: - Presentation of the results of collective **strategic studies** - Feedback on project **capitalisation studies** - Sharing feedback from programme **reviews** - Definition of learning priorities for the coming year	FMU + all funded partners
February - March	◆ Launch of **collective strategic studies** by external service providers ◆ Launch of **project capitalisation studies** by international consortia	FMU (steering) International NGOs (implementation)
March - August	◆ Implementation of work: data collection, interviews, analyses (strategic and project studies)	Operational partners + external service providers
September	◆ Finalisation **of** project **capitalisation studies** ◆ Completion of at least one **collective strategic study**	International NGOs Mandated service providers
October	◆ Autonomous performance of **programme reviews** (After Action Review) in each project (all project sponsors combined)	All projects, without systematic involvement of the FMU
November	◆ Internal consolidation of teaching ◆ Preparing the annual meeting (highlighting productions and proposing themes)	FMU

Appendix 3. SRF theory of change

THEORY OF CHANGE - SRF - 2025

Overall objective: The basic needs of the most vulnerable populations in crisis areas in the Sahel (particularly SA, health, NUT, PROT, WASH) are better met through a humanitarian response based on humanitarian principles, high quality and with a focus on value for money (VFM).

Axe 1 : Quality fundings

IMPACT
A better quality, more effective humanitarian response that complies with humanitarian principles and improves the coverage of basic needs in crisis areas in the Sahel.

RESULT
Vulnerable populations affected by conflict and displacement receive increased assistance and protection, covering both underserved and hard-to-reach rural areas and urban and peri urban areas in crisis.

THEREFORE
NGOs strengthen their financial stability and programming capacity, and are able to design and implement more relevant, coherent and inclusive interventions.

IF
The SRF provides high-quality humanitarian funding that is multi-year, predictable, flexible, and large-scale.,

It ensures that projects meet high standards, are needs-driven, people-centered, locally grounded, and focused on hard-to-reach areas

Axe 2 : Localisation

IMPACT
The role of NNGOs/LNGOs is strengthened within the humanitarian system; they gain recognition and space, contributing to a more inclusive, tailored, and sustainable response to crises in the Sahel.

RESULT
Vulnerable populations, including displaced people and those in hard-to-reach areas, receive locally delivered assistance that is adequate, standards-compliant, high-quality, and offers clear value for money.

THEREFORE
NNGOs/LNGOs are able to deliver humanitarian assistance that is better aligned with standards, of high quality, coordinated with other actors, demonstrates clear value for money, and reaches hard-to-access areas.

IF
The SRF deploys tailored funding channels in an equitable partnership framework.

and provides NNGOs/LNGOs with effective, customized support to strengthen their institutional and operational capacities.

Axe 3 : Regional Catalytic window

IMPACT
NGOs build collective influence and help shape a more inclusive, effective, and principled regional humanitarian system.

RESULT
Within regional coordination, they are able to develop stronger, more coherent, and credible advocacy based on shared evidence.

THEREFORE
NGOs access data, analysis, and tools to strengthen their practices and enhance intervention quality.

IF
The SRF captures and disseminates lessons from its initiatives — especially on quality funding, quality standards, and localization.

And by investing in synergies between national and regional coordination, as well as in innovation and strategic and operational research.

Axe 4 : Contribution to humanitarian reform

IMPACT
The SRF contributes to reforming the humanitarian system in the Sahel and beyond, showcasing the relevance of a regional NGO fund as an innovative, inclusive, and sustainable mechanism

RESULT
This experience contributes, within the framework of the Humanitarian Reset, to the recognition and legitimacy of NGO-led pooled funds as instruments for the future of humanitarian action.

THEREFORE
It stands as a credible example of a pooled fund led by and for NGOs, enhancing both the effectiveness and inclusiveness of humanitarian response.

IF
The SRF is established, managed, and strengthened while proving its capacity to deliver quality, value-for-money humanitarian aid in the Sahel's crisis hotspots.