

MINIMUM ECONOMIC RECOVERY STANDARDS

BENCHMARKING TOOL

TOOL GUIDANCE

VERSION 2.0

JUNE 2021

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INTRODUCING THE TOOL

The MERS standards provide a benchmark of minimum program quality in using market systems approaches in humanitarian response, recovery and resilience building. There are a total of 29 standards across six groupings:

- Core Standards (which mirror the Core Humanitarian Standards but with an additional markets lens)
- Analysis & Assessment Standards
- Enterprise & Market System Development Standards
- Asset Distribution Standards
- Financial Services Standards
- Employment Standards

This tool has been created to facilitate an increase in organisations benchmarking their performance against the MERS and, ultimately, using that knowledge to improve the quality of their programming.

The tool has been designed in order to reduce the administrative burden and time spent on monitoring performance by:

- creating new MEAL tools by providing access to ready-to-use and intuitive monitoring tools accessible to the vast majority of organisations and field practitioners;
- collating all the standards, actions and indicators into one tool as a one-stop-shop for assessing and monitoring performance;
- minimising manual input requirements into the tool through automated processes (the guidance below provides estimated times required for input by the user); and
- providing an amalgamated, standardised visualisation of program performance against the MERS in one simple view to allow Program and MEAL managers to rapidly identify areas for improvement and to compare difference in performance across programs in both excel and Power BI formats.

The MERS dashboard lives in an excel workbook to make it as accessible to as many organisations and field practitioners as possible. Data from the excel workbook can also be easily uploaded to Power BI too.

WHEN TO USE THE TOOL

You can use the standards for guiding and monitoring the quality of:

- 1) **New Programs** - inform new proposal design and organisational readiness
- 2) **Current Programs** - assess current performance and adapt practices for ongoing projects. The tool is specifically designed to be picked up at any time to help rapidly sense-check any potential opportunities for improvements to the program even if programs were not originally using the MERS. [A short case study on how this worked for the DREAMS project by Global Communities can be found here on pages 5-7.](#)
- 3) **Completed Programs** - retrospectively assess completed projects for learning purposes

The standards can be applied to any sector (they are not exclusive to livelihoods or income-generating activities). Economy in this sense refers to the systems that facilitate inclusive access to critical goods and services across all sectors.

The standards can be applied across the crisis lifecycle. They are not exclusively used for recovery programming but can help improve recovery through better crisis preparedness & response.

The standards can be applied across the program lifecycle. Some standards may become more relevant at different stages of a program than others. For example, the Analysis and Assessment Standards will apply early on in the program planning, whilst some of the Financial Standards may inform market assessments but also the design and delivery of interventions. A reference guide has been provided to indicate where in the program lifecycle different standards are likely relevant to help you with your planning (see Step 1 for details).

USING THE TOOL

TOOL LAYOUT

When you open the excel you will arrive at a tab named the STARTING POINT. It is from here that you will be able to access all the tabs for the tool.

There is also a PROGRAM DETAILS tab in which we recommend you at the details of your program for identification purposes and an INSTRUCTIONS tab which provide summary version of this guidance in the excel for quick reference.



CLICK HERE
to Hide / Unhide
Readying Tool Tab

CLICK HERE
to Hide / Unhide
Standard Check-In Tabs

CLICK HERE
to Hide / Unhide
Performance Dashboard Tab

The MERS standards provide a benchmark of minimum program quality in using market systems approaches in humanitarian response, recovery and resilience building.

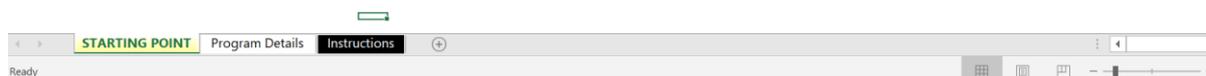
You can use the standards for:

- 1) NEW PROGRAMS - inform new proposal design and organisational readiness
- 2) CURRENT PROGRAMS - assess current performance and adapt practices for ongoing projects (even if they were not originally using the MERS)
- 3) COMPLETED PROGRAMS - retrospectively assess completed projects for learning purposes

The standards can be applied across the program lifecycle and crisis lifecycle (they are not exclusively used for recovery programming but help improve recovery through better crisis preparedness & response).

The standards can also be applied to any sector (they are not exclusive to livelihoods or income-generating activities). Economy in this sense refers to the systems that facilitate inclusive access to critical goods and services across all sectors.

<< NEXT: Use the buttons on this page to hide/unhide the tabs you need or, for new users, go to the instructions tab for more information



To use the tool, we advise the following three step process:

Step 1 – Readyng the Tool

Step 2 – Standards Check-In

Step 3 – Quick view in the Performance Dashboard

STEP 1 – READYING THE TOOL

[TIME ESTIMATE: 30 mins to 2 hours. One-off exercise only. Dependent on understanding of the MERS]

- To ready the tool, you need to first select which MERS you think will be best to support the quality management of your program. Click on the **pink button** to open a tab called READYING TOOL. This will open a new sheet for you to select which MERS you want to apply to this program.

Minimum Economic Recovery Standards
Third edition

The MERS standards provide a benchmark of minimum program quality in using market systems approaches in humanitarian response, recovery and resilience building.

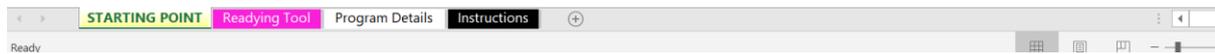
You can use the standards for:

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- To add a relevant MERS standard, you simply change the cell in column E to YES. The excel tool will automatically update to now recognise which standards are relevant for your program.

It is unlikely all the MERS standards will be applicable to every program. The standards are more or less relevant for different parts of the program lifecycle and for different interventions. We know it can be challenging for non-markets experts to assess which standards to choose so a *Reference Guide* has been provided in the READYING TOOL tab to show the relative importance so anyone can set up this tool.

Click on the **pink button** again to close the READYING TOOL tab to protect it from being accidentally edited.

GROUPS			STANDARD	SUMMARY	READY YOUR TOOL	MERS RELEVANCE: A REFERENCE GUIDE			
						Select which standards to apply to your program in the drop down list. You can add standards as the program evolves through the lifecycle.			
						The MERS standards may be more or less relevant both across the program lifecycle and by sector due to the type of intervention you are focusing on. This reference guide suggests the relevance of the MERS to support you in choosing them and when to focus on them more during the program lifecycle.			
						Planning & Preparedness	Analysis & Design	Implementation	Monitoring
CORE STANDARDS	CS1: Humanitarian Programs Are Market Aware		Program design & implementation decisions consider context, market system dynamics, and communities. Market systems programming begins with the needs of the targeted groups.	N/A	High	High	High	High	
	CS2: Efforts Are Coordinated To Improve Effectiveness		For maximum efficiency, coverage, and effectiveness, interventions are planned and implemented in coordination with the relevant authorities, humanitarian agencies, civil society organizations, and private-sector actors. Coordination is internal and external.	N/A	High	High	High	High	
	CS3: Staff Have Relevant Skills		Programs are staffed by individuals who understand economic recovery principles and/or have access to technical assistance. Programs include capacity-building components to improve the relevant economic skills of staff.	N/A	High	High	High	Medium	
	CS4: Do No Harm		The design, implementation, outputs, and environmental impacts of economic recovery interventions address or minimize potential harm, and do not exacerbate economic disparity, conflict, or protection risk, or undermine rights.	N/A	Medium	High	High	Medium	
	CS5: Intervention Strategies For Target Populations Are Well Defined		The intervention strategy is based on solid household and market analysis, and promotes the use of local resources and structure wherever possible, to help targeted household or enterprises reach the desired economic outcomes.	N/A	Medium	High	High	Medium	
AA1: Prepare In Advance Of Assessments		Key elements are in place to conduct an assessment. When an emergency occurs, preparation for the assessment can build quickly on previous planning and existing	N/A	High	High	Low	Low		

Which standard do we select for current programs that were not originally using the MERS?

For programs that have already started, you will be measuring retrospectively on standards you think should have applied to the program from the start so select the standards with this in mind and then follow the same process for monitoring detailed in this guidance.

What if I need to add more standards later in the program lifecycle?

For standards that may become more relevant later on in programs so you may want to add these later which the tool allows you to do. We would advise being aware before you start any program which MERS you might need to adhere to later in your program in order to plan for it in terms of program design and resourcing.

Do we ready the tool for each specific program or for all organisational programs?

You may tailor standards by program or, as an organisation, decide that all programs must adhere to certain MERS standards at a minimum for quality assurance purposes. This is up to you.

The latter approach will significantly reduce the time taken to set up the tool for all program teams and may be the most appropriate way to get the tool to be first adopted. Teams could then add additional standards they deem relevant for their programs.

Who should be involved in readying the tool?

At an organisational level, we would suggest Global Advisory Leads in Markets or Economic Recovery collaborate with Sector Leads, Procurement, Proposal Teams and M&E to decide on a minimum set of standards to achieve.

Indeed, your organisation may be just starting to incorporate market systems approaches into its work and may not be ready to achieve all possible standards in full. This is why collaboratively choosing these standards and understanding the challenges to overcome at a program and organisational level would be best collaboratively discussed. Often, when it comes to using market-based approaches, many of the issues in delivering these approaches are not necessarily due to field constraints, but organisational ones. This is an opportunity to choose standards to aspire to, create your action roadmap and incrementally build capacity to get there.

At a program level, we would suggest discussing the selection of standards amongst key team members - technical markets or sector expert, program manager, M&E, procurement - to agree the aspirations / intentions for the program.



TOP TIP: Pre-emptively read through the actions and indicators for standards that are more applicable later in the program lifecycle because you may need to plan to achieve them in your proposal design and market analysis.

STEP 2 – STANDARDS CHECK-IN

[TIME ESTIMATE: Dependent on how many standards you are updating]

- To add monitor performance (or just read the actions and indicators to achieve for the relevant standards to your program), click on the **grey button** to open or close the standards tabs.

Six tabs will appear each representing the six categories of the MERS. For example, CS = Core Standards; AA = Analysis & Assessment Standards.

Minimum Economic Recovery Standards
Third edition

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You can use the standards for:

- 1) NEW PROGRAMS - inform new proposal design and organisational readiness
- 2) CURRENT PROGRAMS - assess current performance and adapt practices for ongoing projects (even if they were not originally using the standards)
- 3) COMPLETED PROGRAMS - retrospectively assess completed projects for learning purposes

The standards can be applied across the program lifecycle and crisis lifecycle (they are not exclusively used for recovery programming but improve recovery through better crisis preparedness & response).

The standards can also be applied to any sector (they are not exclusive to livelihoods or income-generating activities). Economy in this sense refers to the systems that facilitate inclusive access to critical goods and services across all sectors.

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Ready

- When you open a standards tab, the standards relevant to the program (e.g. the ones picked in the 'Readying Tool' tab) are highlighted in yellow so you can easily find them.

EXPAND TO SEE EXAMPLE ACTIONS TO TAKE TO ACHIEVE STANDARDS

Standard Title	Priority Level of Standard for Project	Level of Performance Against Standard	# Relevant Indicators	# Indicators Achieved
ASSESSMENT & ANALYSIS STANDARD 1: Prepare in Advance of Assessments	Applicable - data required	Applicable - data required	0	0
ASSESSMENT & ANALYSIS STANDARD 2: Scope Of Assessment Is Determined By How Data Will Be Used	Applicable - data required	Applicable - data required	0	0
ASSESSMENT & ANALYSIS STANDARD 3: Fieldwork Processes Are Inclusive, Ethical and Objective	NOT APPLICABLE	NOT APPLICABLE		

Ready

Click on the + on the left-hand side of the excel sheet to expand the applicable standard. This will reveal all the outcomes that need to be achieved to meet the standard as well likely actions you could take to meet those outcomes.

A series of indicators have been provided to support you in identifying whether an outcome has been achieved or not. For some contexts the indicator or outcome may not be relevant and we have allowed you the option of discounting it in this case.

ASSESSMENT & ANALYSIS STANDARD 4: Analysis is Useful and Relevant			
Priority Level of Standard for Project		Applicable - data required	
Level of Performance Against Standard		Applicable - data required	
# Relevant Indicators		0	
# Indicators Achieved		0	
#	KEY OUTCOMES <small>Not all these outcomes may be relevant to the context or crisis lifecycle but provide a guide for what projects can be aspiring for</small>	PROGRESS AGAINST INDICATOR	KEY INDICATORS <small>Adapt indicators to whatever is contextually relevant for your project or current M&E tools</small>
AA4.1	Decision-makers have recent market system information readily available and use it to inform humanitarian interventions & decision-making (OUTCOME SAME AS AA1)		Market systems assessment shared with program decision-makers (or Clusters) ahead of intervention design / delivery All humanitarian program interventions are informed by a recent market assessment prior to implementation Where no market assessment has been used, justification has been provided to support intervention design / delivery
AA4.2	Analytical finding can be understood, interpreted and used by multiple stakeholders		Recommendations are summarised in a prioritization / feasibility matrix (by risk, target group, location, activity type etc.) as pre-agreed by decision-makers Team members (or collaborating stakeholders) understand the recommendations of the analysis and data justifying them Team members (or collaborating stakeholders) use the recommendations to
PRIORITY STEPS FOR PROGRAM IMPROVEMENT & CRITICAL LEARNING			

3. The boxes highlighted in yellow are the ones that need to be filled in.

To input progress against an outcome indicator, simply indicate use the drop-down list and select either: yes, no, partially or not relevant. Some indicators may not be relevant to your context. The tool will automatically calculate performance based on a weighted formula.

Do not leave any cell yellow – all must be filled in even if it is with N/A as this is how the final performance is calculated.

#	KEY OUTCOMES <small>Not all these outcomes may be relevant to the context or crisis lifecycle but provide a guide for what projects can be aspiring for</small>	PROGRESS AGAINST INDICATOR	KEY INDICATORS <small>Adapt indicators to whatever is contextually relevant for your project or current M&E tools</small>
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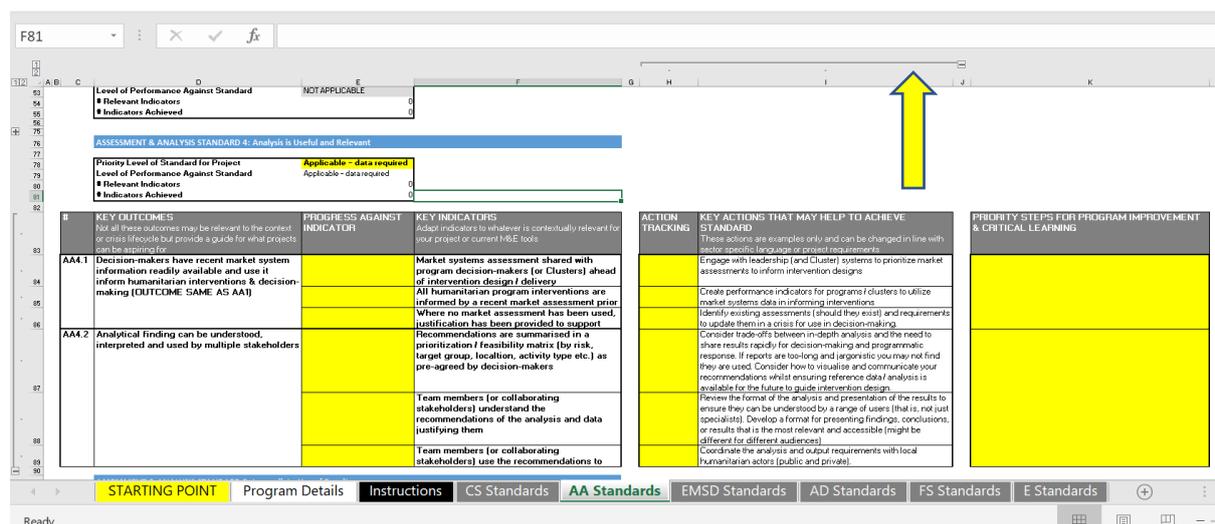
- Use column K to write notes for performance improvement or track learning. It is useful to use this area to note where specific actions may not have delivered the desired outcomes and what to potentially amend or escalate across other programs trying to do similar things.

Can I use this tool to also keep track of actions taken to try and achieve the outcomes that the indicators are monitoring?

[Optional Extra] Hidden from view are also lists of potential actions you could take to achieve your outcomes. These are suggestions based on learning documented in the MERS handbook. They are intended to be indicative only and to help teams trying to design their programs and take actions to achieve the desired outcomes. You have the option of modifying the text in these cells to the actions you decide to take, rather than the examples provided.

To view the examples, click on the + sign at the top of the worksheet which will expand the columns.

You have the option to track against these actions (if you find this useful and to keep all the data in one place) but this is not a mandatory requirement of the tool and will not affect how it functions.



What is the weighted formula used to calculate performance?

The worksheet calculates whether you have achieved a standard based on the number of indicators that are deemed relevant to achieving the standard outcomes.

- You can only fully achieve a standard if all 100% of relevant outcomes are fully achieved (e.g., have 'Yes' inputs).
- You will partially achieve a standard if between 50-98% of the relevant outcomes are achieved (e.g., may be a mixture of 'Yes', 'Partial' and 'No' inputs)
- You fail to achieve a standard if less than 50% of the relevant outcomes are achieved.

Each input has a score which means that 'Yes' and 'Partial' inputs score higher than 'No' inputs and as such is reflected as to whether you partially achieve a standard or fail to achieve it.



TOP TIP: Some outcomes, indicators and actions are similar across different standards. Remember if you are doing this for one standard then you may have achieved it in another too! This is also true for the Core Standards which mirror the Core Humanitarian Standards with an additional markets component.



TOP TIP: We recognise some standards may not be able to be achieved in full due to contextual or capacity reasons. However, this does not mean progress towards a standard has not been made. The tool shows where standards are partially achieved and provided note space for lessons learned.

STEP 3 – PERFORMANCE DASHBOARD

[TIME ESTIMATE: 0 mins – automatically updates]

1. This is the most powerful part of the tool. This is your 'quick view' to gauge program performance against the MERS and allow for rapid analysis of program quality and the ability to quickly hone in on likely areas for improvement. Simply click on the green button to open or close the Performance Dashboard.

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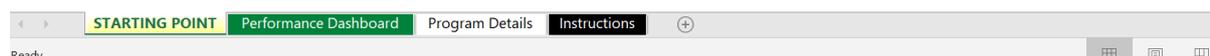
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CLICK HERE to Hide / Unhide Ready Tool Tab

CLICK HERE to Hide / Unhide Standard Check-In Tabs

CLICK HERE to Hide / Unhide Performance Dashboard Tab

Use the buttons on this page to hide/unhide the tabs you need or, for new users, go to the instructions tab for more information



All the MERS standards are shown on the dashboard. It will update automatically using a RAG system to show level of achievement against all standards to date as well as import the program details too:

- GREY - not relevant
- YELLOW - relevant but no data has been inputted
- GREEN - standard achieved
- ORANGE - standard partially achieved
- RED - standard not achieved

PERFORMANCE DASHBOARD
The dashboard below shows the performance of the program for each MERS standard applicable to the program

Click for print A4 view

PROGRAM DETAILS

Project Name: <Enter Project Name Here>	Crisis Context: Crisis Type 1:
Program Code: <Enter Program Code Here>	Crisis Type 2:
Country: <Enter Country Name Here>	Proposed Length of Program / Initiative (months) <Enter Program Length Here>
Region:	Program / MEL Lead:

Core Standards (CS)

CS1: Humanitarian Programs are Market Aware NOT APPLICABLE	CS2: Efforts are coordinated to improve effectiveness Applicable - data required	CS3: Staff have relevant skills NOT APPLICABLE	CS4: Do no harm Applicable - data required	CS5: Intervention strategies for target populations are well defined NOT APPLICABLE
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Assessment and Analysis Standards (AA)

AA1: Program in advance of assessments Applicable - data required	AA2: Scope of assessment is determined by how data will be used Applicable - data required	AA3: Fieldwork processes are inclusive, ethical and objective NOT APPLICABLE	AA4: Analysis is useful and relevant Applicable - data required	AA5: Immediate use of results NOT APPLICABLE	AA6: MEL occurs throughout the program cycle NOT APPLICABLE
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STARTING POINT Performance Dashboard Program Details Instructions



TOP TIP: Click on the orange print A4 view button to get this snapshot ready for printing. This tab can be easily shared with team-members or management to facilitate performance meetings rather than everyone having to know how to use the tool in depth.

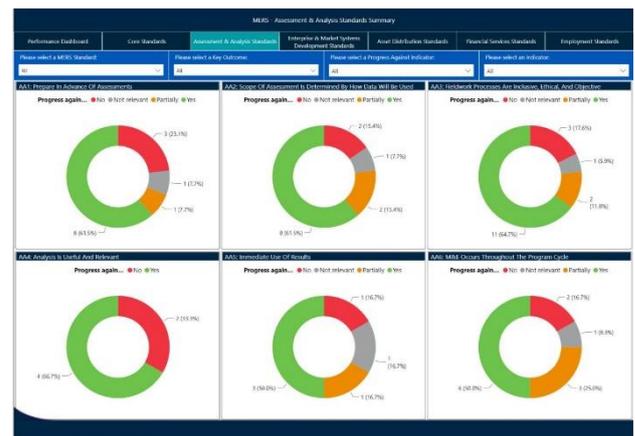
Use the dashboard to compare multiple programs to identify performance trends by context and region which may facilitate strategic decisions on organisational readiness and program suitability.

VISUALISING MERS PERFORMANCE IN POWER BI

If your organisation prefers to showcase its data in Power BI, a Power BI template has been created for you to download from the SEEP website and use either on your laptop or webpage.

All your data is collated into one master-sheet in the REFERENCE SHEET. This is a protected worksheet (which means it cannot be edited) because it automatically pulls in all the data from the workbook into one space.

This sheet can be used to export the tool data into Power BI to visualise it. You can simultaneously show changes in program performance over time showing visualisations between historic files or between different programs. Some examples from the Power BI template are shown below.



VERSION CONTROL

Do not forget to time date every time you update the tool so you have a historic comparison of how the program adherence and applicability to the standards has changed over time. You may find yourself adding more standards later in the program too as they become more relevant to the program lifecycle.

Do not simply overwrite the last file review but create a new file with a new date or version control number.

For example, if you revise the MERS performance quarterly, then save each workbook with this in the title e.g., MERSPerformance_ProjectA_FY1920_Q1

QUESTIONS AND FEEDBACK

This is Version 2.0 of the MERS Dashboard and has been designed built on feedback from the MERS Focal Point Organisations which include DRC, NRC, CARE International and HI.

The tool has also been protected to minimise any risk of users accidentally breaking the tool, but we recognise that some users may want to tailor the tool to their own needs so please contact SEEP if you need this editorial control.

Please feel free to send feedback to improve on the tool or ask us any questions on how to use it by contacting Caroline Smith at smith@seepnetwork.org