LEARNING OBJECTIVES

- Review how your MEL system informs your activities and supports USAID.
- Discover how MEL relates to effective activity management.
- Determine the key elements to include in your MEL plan.
- Develop best practices for a strong tracking process.

WHY MEL IS IMPORTANT

Strong MEL facilitates effective implementation by:
- Systematically collecting and analyzing information to support evidence-based decision-making; and
- Generating learning to inform the adaptation of an activity based on evidence.

It also helps you maintain accountability by:
- Ensuring compliance with USAID policies and federal regulations;
- Promoting transparency and accountability; and
- Providing a basis for sound documentation and reporting.

SUPPORTS IMPLEMENTATION & DECISION-MAKING

Once an activity is awarded, the partner develops a MEL plan to assess progress toward the program's objectives.

- **Monitoring** data helps USAID and its partners understand whether the activity is on track or adjustments are needed.
- **Evaluations** answer key questions related to the implementation or outcomes of the activity.
- **Learning** means analyzing a variety of information to inform possible adaptations needed to achieve programmatic objectives.

FACILITATES LEARNING TO IMPROVE ACTIVITY

Apply lessons learned to:

- Streamline processes;

- More efficiently collect, analyze, and use data and other information;

- Engage regional actors to understand results from a local perspective;

- Adjust reporting processes; and

- Adapt your programming to enhance its effectiveness.

ENSURES COMPLIANCE

Being compliant means that the implementation of your activity follows USAID policies and standard practices.

With a strong MEL plan, you can deliver evidence that you are fulfilling key management requirements and meeting objectives.

PROMOTES ACCOUNTABILITY

Your MEL system's data can confirm that you are following proper management practices and using resources as intended.

Your MEL plan also helps you establish effective procedures for collecting and adapting to feedback from beneficiaries.

SUPPORTS PROGRESS REPORTING

Good MEL practices help you document results in progress reports to USAID.

Work with your Agreement Officer's Representative (AOR) or Contracting Officer's Representative (COR) to determine what information you should report.

Find details on the reporting process at USAID's "**Preparing Progress Reports**" module.
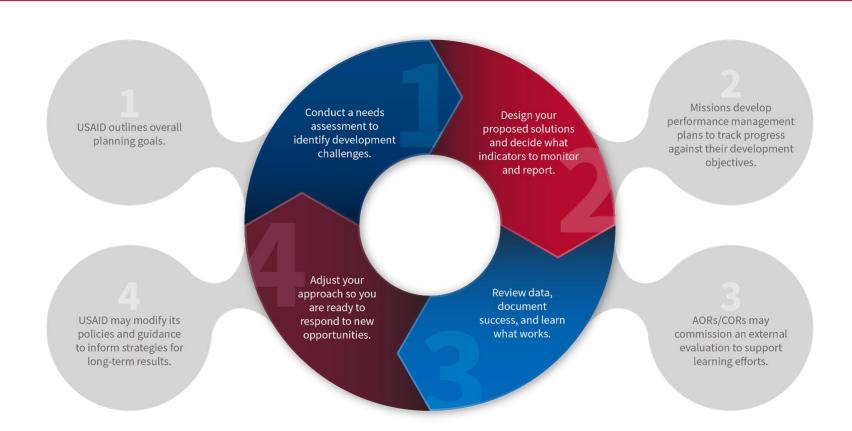
MEL REQUIREMENTS

REVIEW EXPECTATIONS

- Develop your MEL plan within 90 days of signing a USAID award agreement.
- Update the plan as programming needs or operating conditions change.

You need an approved MEL plan in place before you implement any major aspects of your activity.

ACTIVITY MANAGEMENT CYCLE

1 — USAID outlines overall planning goals.

Conduct a needs assessment to identify development challenges.

Design your proposed solutions and decide what indicators to monitor and report.

2 — Missions develop performance management plans to track progress against their development objectives.

Review data, document success, and learn what works.

3 — AORs/CORs may commission an external evaluation to support learning efforts.

Adjust your approach so you are ready to respond to new opportunities.

4 — USAID may modify its policies and guidance to inform strategies for long-term results.

YOUR MEL PLAN: WHAT TO INCLUDE

1. Explain your activity and goals in a summary.

2. Detail how you will measure the success of your activity.

3. Outline how you will collect, monitor, and maintain data and other information.

4. Describe how you will use this information to learn and adapt your programming.

Find a guide to content in USAID's How-To Note: Activity MEL Plan.

BASE YOUR MEL PLAN ON ACTIVITY DESIGN

Your MEL system will be based on your activity design.

Consider these questions to develop and manage a more effective MEL system:

- What is the goal of your activity?
- What kinds of data and other information will help you determine effectiveness?
- How will you document your results?
- How will your team make adjustments and changes based on this information?

KEY ELEMENTS: MONITORING

Your MEL plan should describe the expected results and the indicators you will use to track your progress.

- **Performance Indicators** help answer the extent to which an activity is progressing.
- **Standard Foreign Assistance Indicators** are collected by Agency partners across activities.
- **Context Indicators** measure factors outside the control of USAID that have the potential to affect the achievement of expected results.

PERFORMANCE INDICATORS

Include a tracking table to describe each performance indicator and how you will collect data.

- Begin by gathering **baseline data**, or information related to each indicator immediately prior to the start of your interventions.

Detail how you will monitor the quantity, quality, and timeliness of outputs and outcomes.

- **Outputs** are short-term and direct results. An example would be the number of farmers trained in production practices. This change can be directly attributed to your work.

- **Outcomes** are longer-term, more gradual changes that you may influence but do not directly control. An example would be improved crop yields based on the use of new farming technology.

TYPES OF DATA

Your activity's MEL system should generate two types of data:

- **Quantitative** data is represented in the form of numbers, such as workshop participation rates or number of households reached.

- **Qualitative** data is in the form of words and pictures. It includes feedback such as stakeholder interviews and staff insights about activities.

When handling data tied to personal identifiable information, ensure confidentiality through secure data storage and access controls.

ENSURE DATA QUALITY

Use the following criteria to ensure data quality:

- **Validity:** Data should clearly represent the intended result.
- **Integrity:** There should be safeguards to minimize the risk of bias, errors, or data manipulation.
- **Precision:** Data should have a sufficient level of detail to inform decision-making.
- **Reliability:** Data should reflect stable, consistent collection and analysis methods.
- **Timeliness:** Data should be current, available often, and timely enough to inform decisions.

Work with your AOR/COR to determine whether and when USAID will conduct a data quality assessment.

Use USAID's guide to [Conduct a Data Quality Assessment.](#)

KEY ELEMENTS: EVALUATION

- An evaluation generates information on the extent to which an activity is being implemented as planned and achieving desired results.
- It provides information for long-term planning and decision-making.

Evaluations are posted to the **Development Experience Clearinghouse**.

KEY ELEMENTS: LEARNING

Improve the effectiveness of your activity by incorporating the collaborating, learning, and adapting (CLA) process:

- **Collaborate** with the right partners;
- Plan to **learn** by asking questions; and
- Prepare to **adapt**.

Learn more at USAID's Learning Lab.

MEL PERSONNEL AND PROCESS

STAFF AND SKILL SETS

You will need to devote staff time to:

- **Manage** the overall MEL approach for your USAID award.

- **Coordinate** the actions, from design to evaluation, that make up your MEL system.

- **Ensure** data are properly organized, entered accurately, and stored securely.

- **Incorporate** CLA practices across the full activity management cycle.

TIME MANAGEMENT

Plan for success by scheduling enough time to:

- Collect, review, and analyze the data and consider how it reflects on the implementation of your activity;

- Involve relevant staff early to create a coherent progress report from different aspects of your program; and

- Allow your organization's leadership to review and approve the report before submission to USAID.

TELL YOUR ACTIVITY'S STORY

Successful program stories are important communication tools to share your work with donors, stakeholders, and the public.

- A strong MEL system offers evidence and examples that convey your activity's impact.
- Work with your AOR/COR to identify opportunities to promote the efforts of your organization and the Agency.

KEY POINTS

- **Develop** indicators to monitor progress and measure the direct results of your work.

- **Confirm** the quality of your data so that decisions and progress reports are based on accurate information.

- Be prepared to **support and collaborate** with external evaluators commissioned by USAID.

- **Use the CLA approach** to continue to adapt your activity so it remains relevant and effective.

- When preparing progress reports, give your team time to **collect and analyze data** and **consider lessons learned**.

RESULTS

- **USAID Evaluation and Monitoring Terms** (PDF)

- **Learning Labs:**

  - **MEL Plan Template**

  - **Evaluation Toolkit**

  - **Monitoring Toolkit**

  - **CLA Toolkit**

- **USAID Compliance Division**

- **ADS 201**: Monitoring (201.3.5), Learning (201.3.6), and CLA (201.3.7)

- **Training modules at WorkwithUSAID.org:**

  - "**Preparing Progress Reports**"

- **How-To Notes:**

  - **Activity Monitoring, Evaluation & Learning (MEL) Plan** (PDF)

  - **Conduct a Data Quality Assessment** (PDF)

- **Development Experience Clearinghouse**

Questions? Ask your AOR/COR.

Thank You

This module was produced by the United States Agency for International Development. The presentation team includes staff from both USAID and the Partnerships Incubator.

USAID thanks all of the individuals who contributed their time and ideas toward the development of this training module.

Email questions and feedback: **IndustryLiaison@usaid.gov**

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