



# ACTIVITY MONITORING, EVALUATION, AND LEARNING PLAN TEMPLATE

## Introduction

The template that follows this introductory page provides a suggested outline and basic guidance for the development of an Activity Monitoring, Evaluation, and Learning Plan (Activity MEL Plan) by a USAID implementing partner. As noted in USAID’s **ADS 201.3.4.10**: “Activities must have an approved Activity MEL Plan in place before major implementation actions begin.” For further policy on Activity MEL Plans, see ADS 201.3.4.10. This template should be used in conjunction with the guidance provided in USAID [How-To Note: Activity Monitoring Evaluation and Learning Plan](#).

## How to Use This Template

While Activity MEL Plans are required for most activities, this template is not required, nor is there any Agency-wide required structure or format of Activity MEL Plans. This template is merely offered as a helpful tool for USAID staff and implementing partners.

USAID Missions and other Operating Units that choose to provide a standard Activity MEL Plan template to their implementing partners may adopt this template, adapt it, or devise a standard template of their own. USAID Missions and other Operating Units may also leave the decision of how to structure and format the Activity MEL Plan to their implementing partners.

USAID implementing partners should consult with their COR or AOR about specific requirements or recommendations for their Activity MEL Plan.

The italicized text in each template section provides guidance and recommendations for what to include in that section, including examples and sample text. Required elements are noted in footnotes. For additional guidance on Activity MEL plans see the USAID [How-To Note: Activity Monitoring Evaluation and Learning Plan](#).

Please note that per ADS 579.3.1, all activities that require an Activity MEL Plan also require a Data Management Plan (DMP). The DMP may be developed and approved as a section of the Activity MEL Plan or as a separate plan. For further guidance on Data Management Plans, see [ADS 579](#).



# [ACTIVITY TITLE]

## Activity Monitoring, Evaluation, & Learning Plan

**Approved Date:** [e.g., April, 2018]

**Version:** [1]

**Contract/Agreement Number:** [Insert number]

**Activity Start and End Dates:** [e.g., January 1, 2018 to December 31, 2023]

**AOR/COR/Activity Manager Name & Office:** [Insert name, office]

**Submitted by:** [Insert name, position]

[Name of Prime Implementing Partner (IP)]

### **DISCLAIMER**

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

## I. Introduction

*This section introduces the Activity MEL Plan, describes the structure of the plan, sets the time period covered by the plan, and describes how it will be updated.*

### ACTIVITY THEORY OF CHANGE

*Include a brief summary description of the activity theory of change.*

### LOGIC MODEL

*Add a logic model that graphically depicts the activity theory of change. Performance indicators and learning questions may be added to the logic model where relevant to indicate the connection between elements of the theory of change and MEL tasks.*

## 2. Monitoring Plan

*Describe the activity's monitoring approach, including monitoring processes and systems.<sup>1</sup>*

### PERFORMANCE MONITORING

*Describe the efforts to monitor activity performance.*

*A summary of the relevant performance indicators of the activity's outputs and outcomes, their baseline values (or plan for collecting baseline), and annual targets should be listed in the Annex.<sup>2</sup>*

### CONTEXT MONITORING

*Describe any efforts for monitoring the activity's context and emerging risks that could affect the achievement of the activity's results.*

## 3. Beneficiary Feedback Plan<sup>3</sup>

1. Determination on whether collecting beneficiary feedback is appropriate for the activity. If not, then a written explanation for why not
2. Describe procedures for collecting feedback from beneficiaries.
3. Describe procedures for responding to feedback from beneficiaries.
4. Describe procedures for reporting to USAID.

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<sup>1</sup> This is a required element of an Activity MEL plan per USAID ADS 201.3.4.10.

<sup>2</sup> This is a required element of an Activity MEL plan per USAID ADS 201.3.4.10.

<sup>3</sup> This is a required element of an Activity MEL plan, "as appropriate" per USAID ADS 201.3.4.10.

## 4. Evaluation Plan

### INTERNAL EVALUATION PLAN

*If intending to conduct an internal evaluation using USAID funds, then complete the internal evaluation table for each evaluation expected over the life of the activity.*

#### Internal Evaluation Table

Evaluation Type	<i>Performance or Impact</i>
Evaluation Purpose and Expected Use	
Possible Evaluation Questions	
Estimated Budget	
Start Date	
End Date	

### PLANS FOR COLLABORATING WITH EXTERNAL EVALUATORS

*If USAID is planning to conduct an external evaluation of this activity, describe how the activity will collaborate with the external evaluation team.*

## 5. Collaborating, Learning, and Adapting Approach

*Include learning questions related to the theory of change or knowledge gaps and plans to address them. Describe plans for strategic collaboration with other activities or stakeholders; reflection opportunities; how the implementing partner will use new knowledge and learning for adaptations; and plans for knowledge capture at closeout.*

## 6. Resources

*Specify the budget allocated to monitoring, evaluation, and learning by listing the tasks, estimated costs, and proportion of the budget.*

## 7. Roles and Responsibilities

*Describe the general and individual roles and responsibilities for activity monitoring, evaluation and CLA tasks and approaches.*

## 8. Schedule of Activity MEL Plan Tasks

*Provide a schedule of recurring tasks related to monitoring, evaluation, CLA or other planned learning efforts during the activity and the individuals who are responsible for them.*

**Schedule of Recurring Tasks Table**

Tasks	Frequency	Responsible person or team

**9. Schedule of Activity MEL Plan Deliverables to USAID**

List the various monitoring, evaluation, and CLA or other learning deliverables (including ad hoc and recurring reports) that will be provided to USAID.

**Example Schedule of Activity MEL Plan Deliverables to USAID Table**

Deliverable	Frequency	Transmission to USAID via	Description of Content

**10. Change Log**

Describe the changes that are made to the Activity MEL Plan over time.

**Example Change Log**

Date:	Change By:	Change to:	Description of Change:
<i>Effective date of change.</i>	<i>Person or team who made the change.</i>	<i>Section of the Activity MEL Plan changed. If indicator is changed, include the Indicator No.</i>	<i>Summarize the change that was made to the Activity MEL Plan and the reason the change was made.</i>

## Annex I: Indicator Summary Table

*An Indicator Summary Table is provided below. This plan may be adapted to include other information based on what is most relevant to the needs of the activity implementing partner or the USAID Operating Unit.*

### **Instructions**

1. **Indicator:** State the name and unique identifier for the indicator that will measure the expected result listed in the next column. Disaggregates of an indicator may be listed on a separate row below the parent indicator.
2. **Result Measured by Indicator:** State the result statement and the unique identifier for the expected result in the theory of change that the indicator intends to measure.
3. **Type of Indicator:** State whether the indicator is (1) a “Performance” indicator or a “Context” indicator, and (2) a “Standard” indicator or a “Custom” indicator.
4. **Data Source:** State the source of the data or planned source of the data.
5. **Frequency:** State how often the data are reported to USAID.
6. **Unit of Measure:** State the unit of measure (e.g., number of hours, percent of households).
7. **PPR:** State “Y” if this indicator is included in the PPR or “N” if this indicator is not included in the PPR. (Note: standard indicators are required to be reported in the PPR.)
8. **Baseline Date:** State the month and year (mm/yyyy) when the baseline data were collected. If baseline is still planned, state the month and year when the baseline is planned to be collected.
9. **Baseline Value:** State the value of the indicator at “baseline,” i.e., before major implementation actions of the planned USAID-supported activity. Enter “TBD” if the baseline has not yet been collected.
10. **Target Date:** State the month and year (mm/yyyy) for when the target value is expected to be achieved. This may be aligned with the reporting frequency of the indicator, it may be an end-of-activity target, or some other relevant milestone date.
11. **Target Value:** State the estimated value of the indicator expected on the target date.

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Example Indicator Summary Table

Indicator	Result Measured by Indicator	Type of Indicator	Data Source	Frequency	Unit of Measure	PPR (Y/N)	Baseline		Target	
							Date	Value	Date	Value
<i>Examples...</i>										
<i>Indicator DR.1.5-1 Number of USG-assisted courts with improved case management systems</i>	<i>Improved operations of civil courts</i>	<i>Performance / Standard</i>	<i>Implementing Partner count of courts assisted.</i>	<i>Reported annually.</i>	<i>Number</i>	<i>Y</i>	<i>09/2017</i>	<i>0</i>	<i>09/2022</i>	<i>120</i>
<i>Indicator 3.4.1(a) Neonatal mortality rate (number of deaths of infants during the first 28 days of life per 1,000 live births) in childbirth facilities in the southern region</i>	<i>Improved child birth outcomes in the southern region</i>	<i>Performance / Custom</i>	<i>Survey of child birth facility vital registration data.</i>	<i>Reported quarterly.</i>	<i>Number per 1,000</i>	<i>Y</i>	<i>01/2016</i>	<i>55.3</i>	<i>09/2021</i>	<i>40.0</i>
<i>Indicator 3.4.1(b) FEMALE - Neonatal mortality rate (number of deaths of infants during the first 28 days of life per 1,000 live births) in childbirth facilities in the southern region</i>	<i>Improved child birth outcomes in the southern region</i>	<i>Performance / Custom</i>	<i>Survey of child birth facility vital registration data.</i>	<i>Reported quarterly.</i>	<i>Number per 1,000</i>	<i>Y</i>	<i>01/2016</i>	<i>55.2</i>	<i>09/2021</i>	<i>40.0</i>
<i>Indicator 3.4.1(c) MALE - Neonatal mortality rate (number of deaths of infants during the first 28 days of life per 1,000 live births) in childbirth facilities in the southern region</i>	<i>Improved child birth outcomes in the southern region</i>	<i>Performance / Custom</i>	<i>Survey of child birth facility vital registration data.</i>	<i>Reported quarterly.</i>	<i>Number per 1,000</i>	<i>Y</i>	<i>01/2016</i>	<i>55.4</i>	<i>09/2021</i>	<i>40.0</i>