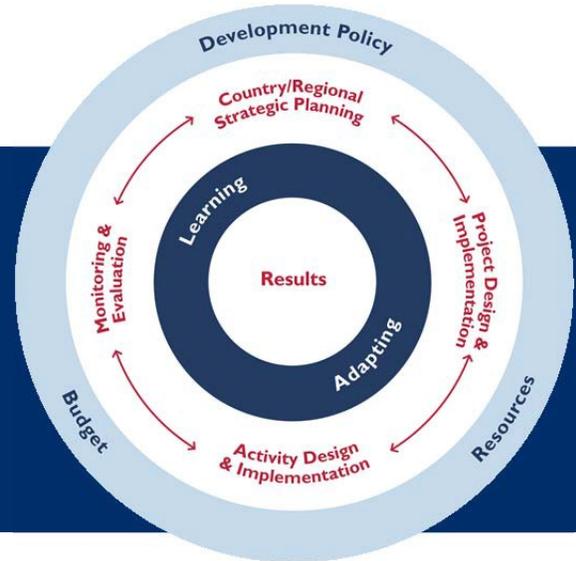


# PROGRAM CYCLE

## How-To Note: Project Monitoring, Evaluation, & Learning (MEL) Plan



This resource describes how to prepare and maintain a Project Monitoring, Evaluation, and Learning Plan.

How-To Notes provide guidelines and practical advice to USAID staff and partners related to the Program Cycle. This note was produced by the Bureau for Policy, Planning and Learning (PPL).

### Introduction

This How-To Note supplements [ADS 201.3.3.13](#). It provides an overview of what is required in a Project Monitoring, Evaluation, and Learning (MEL) Plan, and outlines practical steps for developing, maintaining, and using a Project MEL Plan. The primary audience includes Project Managers, the Project Design Team, Project Team, Activity Managers operating under the project, Technical Office staff and directors, Program Officers, and any M&E Specialist or Learning Advisor supporting the project.

### Background

The Project MEL Plan is developed during project design. It describes how the Project Team plans to collect, organize, analyze, and apply learning gained from monitoring and evaluation data and other sources.

Although approved as a section of the Project Appraisal Document (PAD), the Project MEL Plan should be revisited and updated on a regular basis. In the initial development of the Project MEL Plan, the Team should set up “guide-posts” with the intention to finalize or revise it as implementation progresses, activities are awarded, and new information is learned.

### Content of the Project MEL Plan

The Project MEL Plan contains at least three distinct, yet interrelated sections: (1) monitoring, (2) evaluation, and (3) learning. Each section should be concise. A guiding principle to the development of the Plan is to include those monitoring, evaluation, and learning processes that will produce information to be used at periodic project reviews to inform decision-making to adaptively manage the project or to inform lessons for future projects.

There is no required or standard format for a Project MEL Plan, though some USAID Missions have created their own template. Project Teams may have sections or components they would like included beyond the required sections of monitoring,

evaluation, and learning.

The following sections outline requirements and recommendations for content to be included in the Project MEL Plan.

## **INTRODUCTION (Recommended)**

An introduction enables the Project MEL Plan to act as a standalone management tool for the Project Team. This section introduces the Project MEL Plan, outlines the structure of the Plan, and describes its intended use. The Project Team may also decide to include the project logic model with explanation of the key monitoring, evaluation, or learning efforts discussed in the Plan, and how they relate to each other. For example, results and assumptions highlighted in the logic model might be paired with the indicators selected to monitor those results and assumptions. Likewise, the introduction may show how key learning and evaluation questions relate to specific aspects of the logic model.

## **MONITORING SECTION (Required)**

The monitoring section describes how the project will monitor both performance and context. Performance monitoring tracks progress toward planned results defined in the logic model. Context monitoring tracks the assumptions or risks defined in the logic model. In other words, it monitors the conditions beyond the project's control that may affect implementation.

### **Performance Monitoring Indicators**

The monitoring section must include at least one performance indicator to monitor progress toward the achievement of the Project Purpose, the key result to be achieved by the project. If the Project Purpose is aligned to a result in the Country Development Cooperation Strategy (CDCS) Results Framework, such as an Intermediate Result (IR), for example, then the same indicator(s) should monitor the achievement of both the Project Purpose and the Results Framework result to which it is aligned. During the project design process, indicators that were identified during CDCS development are often revised. The Project MEL Plan includes the current indicator(s), and the PMP is revised to include the updated indicator(s).

The monitoring section also includes other key project performance indicators that are necessary to monitor progress toward achievement of expected project outcomes *below* the Project Purpose. ADS 201 states that such key project performance indicators should measure outcomes that are (1) relevant – i.e., related to the project's logic model and (2) significant – i.e., an important outcome in the chain of results that lead to the Project Purpose.

### **PMPs, Project MEL Plans, and Activity MEL Plans**

**Performance Management Plan (PMP)** is developed by a Mission following CDCS approval to monitor, evaluate, and learn from the strategy.

**Project MEL Plan** is developed by a USAID team during project design to monitor, evaluate, and learn from a USAID project.

**Activity MEL Plan** is typically developed by an implementing partner following award to monitor, evaluate, and learn from a USAID activity.

Each plan serves a distinct management purpose, but they are related and should be congruent, with some information appearing in multiple plans. For instance, a performance indicator may have relevance for, and appear in, all three plans; an evaluation planned during project design may appear in both a Project MEL Plan and the PMP; or learning questions that emerge during CDCS development may appear in all three plans.

Information should not simply be duplicated in all plans, but should only be included as necessary. For example, an indicator that is useful for a project and an activity does not need to appear in a PMP.

### **Helpful Hint**

For a typical project, the CDCS sub-IRs are likely to be significant and relevant outcomes to monitor for project management.

ADS 201 provides considerable discretion to the Project Team to decide which results should be monitored by performance indicators and how many performance indicators to include in the Project MEL Plan. Not every expected result described in the project design or depicted in a project logic model requires an associated performance indicator. Nor should every activity-level indicator from MEL Plans of activities under the project be included in the Project MEL Plan. Other than the required Project Purpose indicator, a Project Team should decide which performance indicators that they deem most necessary for managing the project. Some intermediate outcomes may be particularly difficult to monitor and some indicators may be too costly to track relative to their benefits. Additionally, indicators are not always the best approach for monitoring intended results. In some circumstances, outcomes may be more appropriately monitored through tracking of milestones, site visits, key stakeholder interviews, and periodic qualitative monitoring reports (as discussed below in the “Other Monitoring Efforts” section).

For example, a Mission may design a project that has a Project Purpose to “increase farmer incomes.” In this example, the Project Team expects that by training farmers in new technologies, farmers will adopt the new technology and farmers’ yields will increase, leading to increased farmer incomes. The MEL Plan for this project must include an indicator of farmer incomes because it is the Project Purpose. The Project Team may also choose to track the farmer yields, as this result is both significant and relevant for achieving the Project Purpose. The farmers’ adoption of new technology is also relevant to the Project Purpose; however, the Project Team may choose not to monitor this result if it is cost prohibitive to do so, or may use qualitative monitoring approaches, such as interviewing a representative sample of farmers on their experiences related to adopting new technology.

Outcome indicators are typically better suited than output indicators to include in a Project MEL Plan. However, there are times when including output indicators in a Project MEL Plan may be useful for project management, including:

- Data for the output indicator are being collected by multiple activities;
- The outputs are particularly important to determining the progress of the project as a whole;
- The indicator is of particular interest to Mission management, Congress, local partners and stakeholders, or it is required to be included in the Performance Plan and Report (PPR).

Recognizing the interdependence of the Project MEL Plan to the Activity MEL Plans, Project Teams will need to plan to coordinate indicator data collection and analysis across multiple activities as monitoring the progress toward some project-level results may require aggregating indicator information across different implementing mechanisms.

Once indicators have been selected, it is useful to summarize them in a table that can provide the required information on baseline and end-of-project target values—or a plan for collecting baselines and setting targets—for each indicator. A summary table should include the full set of performance and context indicators, linked to the corresponding result. The Monitoring Toolkit has a [sample template for a Performance Indicator Summary Table](#).

#### **Helpful Hint**

Assessments and analyses collected to inform project design may also inform the indicators used in the Project MEL Plan. In these cases, baseline data may have already been collected, and a Project Team may also use the research to inform target setting.

#### **Indicator Reference Information**

For each performance indicator selected, indicator reference information must be developed and stored so

that it is accessible to all Mission staff and implementing partners. Such information is typically stored in a Performance Indicator Reference Sheet (PIRS). A PIRS helps ensure reliable data collection and use over time and across partners. A PIRS must be completed for all performance indicators within three months of the start of indicator data collection.

For all indicators included in the PMP and already in use, a PIRS should have been previously developed. For any new indicator developed during project design, the Project Team will need to develop the PIRS. PIRSs do not need to be included in the Project MEL Plan. However, wherever they are stored, they must be easily accessible to the Project Team and anyone else who will be collecting or using the indicators, such as activity implementing partners. For more information, see [Guidance and Template for a PIRS](#).

### **Indicator Baselines and Targets**

Prior to PAD approval, all performance indicators must have a baseline value and date of baseline data collection, unless it is not feasible to collect baseline data prior to PAD approval. In such cases, the Project MEL Plan must clearly specify a plan for collecting remaining baseline data.

All performance indicators must also have a documented end-of-project target and rationale for that target, prior to PAD approval except in cases where further analysis is needed before setting targets. In those cases, the Project MEL Plan must document the plan for setting these targets

It is recommended that the Project Team set targets in time periods that are useful for project management, which may vary in frequency. If any of the indicators are planned to be reported in the PPR, annual targets at a minimum should be set. Find more information about collecting baselines and setting targets in the [Monitoring Toolkit](#).

### **Context Monitoring**

The Project Team should plan to use context monitoring (including specific context indicators) to monitor the assumptions and risks identified in the project logic model. Context refers to the conditions and external factors relevant to implementation of USAID strategies, projects, and activities. Context includes the environmental, economic, social, or political factors that may affect implementation, as well as how local actors, their relationships, and the incentives that guide them affect development results.

If context indicators are to be included as part of the Project MEL Plan it is useful to document a baseline for the context indicators. While targets are not set for context indicators, the Project Team may want to establish “triggers,” i.e., a value or threshold, which if crossed would prompt an action, for context indicators. Meeting or not meeting the threshold for a trigger could lead to closer inspection of assumptions, prompt certain actions on the part of the Mission, or be used to inform decisions. For example, an agricultural project may monitor “amount of rainfall.” A Project Team may set two triggers for this indicator to watch out for excessive or insufficient amounts of rainfall. Excessive rainfall could cause crops to rot, while insufficient rainfall could cause crop failure without additional inputs. Exceeding the high trigger or not meeting the low trigger would each affect project outcomes, and the Project Team might have to pivot implementation to respond to the changing context. A Context Indicator Reference Sheet (CIRS) is recommended for each context indicator.

### **Other Monitoring Efforts**

Any other planned efforts for monitoring progress toward achievement of intended project outcomes (e.g.,

site visits, key stakeholder interviews, periodic qualitative monitoring reports, etc.) must be described in the Project MEL Plan. The Project MEL Plan may also include:

- Information about the purpose of each described effort;
- The expected result(s) each effort will monitor;
- The expected timeframe for when it will occur;
- Who will be involved (i.e., which activities, partners, beneficiaries, and USAID staff, as well as relevant host country counterparts and other donors); and
- What actions may result from the findings (i.e., the intended use for the data).

Where appropriate and feasible, the monitoring section notes how project monitoring aligns with indicators and data systems in use by host country counterparts and other donors in the relevant sector. The Project Team may consider working with their regional bureau or USAID/Washington pillar bureau to incorporate best practices for monitoring in specific sectors.

### **Managing Project Indicator Data**

ADS 201.3.5.7 states that performance indicator data must be stored in an indicator tracking table or monitoring information system. This includes the baseline values, the baseline timeframe, targets and actual values. Indicator data in tracking tables or information systems must be updated per the reporting frequency set in the PIRS for each indicator. A monitoring information system that serves as a centralized repository for indicators identified in a Mission-wide PMP and Project and Activity MEL Plans is recommended over separate and decentralized tracking tables.

It may be useful to include in the monitoring section of the Project MEL Plan a brief description or plan to support data collection, storage, security, and quality. Some examples might include: defining a geographic boundary by which all data will be disaggregated, drafting a protocol to ensure proper data storage and security, and scheduling any Data Quality Assessments (DQAs) to be conducted at regular intervals. More information about all of these subjects is included in the [Monitoring Toolkit](#).

### **EVALUATION SECTION (Required)**

The evaluation section describes all anticipated evaluations relevant to the project and can be used to track evaluations over the project's timeframe. Project design is an appropriate time to begin thinking about evaluations, including those that focus beyond the scope of individual activities and attempt to incorporate aspects related to the overall management of the project. These types of evaluations may include:

- The project's theory of change;
- Issues that cut across activities;
- Local ownership and sustainability of results achieved after the end of the project; and
- The extent to which projects or supportive activities have transformed gender norms and reduced gender gaps for men and women across diverse groups.

The purpose of evaluations is twofold: to ensure accountability to stakeholders and to learn in order to improve development outcomes. Evaluation is the systematic collection and analysis of information about the characteristics and outcomes of strategies, projects, and activities conducted as a basis for judgements to

improve effectiveness and timed to inform decisions about current and future programming. Evaluations are distinct from assessments or informal reviews of projects. Evaluations may be performance or impact; conducted internally or by an external evaluation team; and may be conducted at the midterm of project or activity, at the end of the project or activity, or even after a project or activity has ended.

Evaluations may generate evidence to answer questions that represent gaps in knowledge that cannot be answered readily by other means (analyzing monitoring data, for example). Evaluations may focus on one or more activities within a project, or on the project as a whole. The evaluation section is an opportunity for the Project Team and Program Office to determine how evaluations can inform learning and management needs. There are three requirements that trigger when or how to conduct an external evaluation, all of which involve decisions that are best discussed during project design.

- 1. One Evaluation per Project:** Each Mission must conduct at least one evaluation per project. This evaluation could address the project as a whole, a single activity, a set of activities within the project, or a crosscutting issue within the project.
- 2. Impact Evaluation for Pilot Approaches:** An impact evaluation must be conducted of any new, untested approaches that are anticipated to be expanded in scale or scope. If it is not feasible to effectively undertake an impact evaluation, then the Project Team must document why an impact evaluation was not feasible, and must conduct a performance evaluation of the pilot intervention.
- 3. Whole-of-Project Evaluation:** Each Mission must conduct at least one “whole-of-project” performance evaluation within their CDCS timeframe. A whole-of-project evaluation examines the entire project, including all its constituent activities, and progress toward the achievement of the Project Purpose. See [ADS 201 Additional Help: Whole-of-Project Evaluation](#).

Both an impact evaluation to examine a pilot approach and a whole-of-project evaluation meet the requirement of one evaluation per project.

The Project MEL Plan approved with the PAD must identify and describe any evaluations that will be conducted to fulfill the “one evaluation per project” requirement, identify any impact evaluations for pilot approaches, and identify if the project will be subject to a whole-of-project evaluation.

A summary description of each planned evaluation should be included in the Project MEL Plan. Each planned evaluation should include the following information: name of the project or activity to be evaluated, evaluation purpose and expected use, evaluation type (performance or impact), possible evaluation questions, whether it is external or internal, ADS 201 required evaluation or not, estimated budget, planned start date, and estimated completion date. See the [Multi-Year Evaluation Plan Summary and Schedule Template](#) for more guidance. Any external evaluation must be managed by the Program Office, so it is good practice for the Project Team to consult with the Program Office at this early stage.

#### **Collaborate with Local Partners**

The Project Team may consider engaging local partners in the evaluation section. This could include collaborating on the development of the design and dissemination of the evaluation, among other efforts. Such collaboration can serve to ensure relevancy of evaluation questions and buy-in of evaluation findings and recommendations. Partners to consider engaging include beneficiaries, local stakeholders, other donors, and the country government. If the Project Team plans to partner with the country government through a Government-to-Government (G2G) Agreement, refer to the [ADS 201 Additional Help: Monitoring & Evaluation for a G2G Agreement](#).

Evaluation planning should also include considerations of methodologies, timing, and stakeholder engagement. It is particularly important that expected impact evaluations be identified when developing the Project MEL Plan to ensure the evaluation will be implemented in parallel with the intervention. For more information on impact evaluations, see [Technical Note: Impact Evaluation](#). Evaluation efforts, including project level baseline, midterm, and end line data collection, also require close collaboration with implementing partners and affect related activity procurement documents. Further planning for close collaboration with key stakeholders helps ensure evaluation findings are communicated in a timely manner.

During project implementation, unexpected events may occur or new information may become available that lead to a decision to conduct an evaluation. A Project Team should consider what events or information might trigger conducting a previously unplanned evaluation and include these triggers in their Project MEL Plan. Such triggers might be a change in the host country context, large deviations of indicator results from targets, or changes in project assumptions or risks, among others. For more information, see [ADS 201 Additional Help: Evaluation Triggers](#).

To ensure sufficient advance planning so that evaluations can be timed to inform upcoming decisions, consider drafting a timeline of anticipated evaluations, including not only the timeframe to implement the evaluations, but also key dates related to designing, procuring, and utilizing evaluations. Include [Evaluability Assessments](#) in the timeline if they are to be conducted. Other timing considerations include planning for collecting baseline data before the launch of an activity or project and ensuring enough time for the evaluator to design and test data collection instruments. The [Evaluation Toolkit](#) has a sample template to use for a [Multi-Year Evaluation Plan Summary and Schedule](#).

Project Teams should also consider an estimated budget and source of funds for each planned evaluation. [ADS 201.5.13](#) recommends Missions and Washington OUs devote an average of 3 percent of total program funding to external evaluations. For more information about planning, managing, conducting, and using evaluations, see the [Evaluation Toolkit](#).

## **LEARNING SECTION (Required)**

The section on learning discusses how the Project Team will work with partners and stakeholders to learn from the project and its activities throughout implementation and act on that learning to adaptively manage the project.

The learning section may also identify:

- Learning questions based on the project's logic model;
- Plans for addressing those questions through performance monitoring, evaluations, or other means, such as research or analyses;
- Other opportunities to facilitate collaborative learning among USAID, implementing partners, and stakeholders (such as through learning networks, pilot activities, peer assists, or communities of practice) that would be used to explore gaps in knowledge;
- Plans for tracking potential contextual issues and how the project will be adapted to adjust;
- Opportunities to reflect on performance and the context, such as project reviews or partner meetings;
- Plans to engage local stakeholders and implementing partners to share knowledge and experience; and

- How the Project Team intends to use monitoring, evaluation, and learning data to inform adaptations to the project and its activities.

The Project MEL Plan's learning section should reflect relevant information from the CLA Plan in the PMP, and be structured in a way to ensure that activities contribute to the project's learning needs. For more information about methods and uses for collaborating, learning, and adapting see the [CLA Toolkit](#).

Missions and Washington OUs must also consider funding requirements for monitoring, evaluation, and learning efforts outside of programmatic activities and account for them accordingly in the [Project Financial Plan](#).

## **ROLES & RESPONSIBILITIES (Recommended)**

The process of developing and using a Project MEL Plan is a team effort. In some cases, including a section about roles and responsibilities can clarify who needs to be engaged, how, and when. A roles and responsibilities section may be particularly useful when the Mission has an external M&E support contract. This helps to ensure consistent application of the MEL Plan and promotes institutional memory. The Project MEL Plan may describe roles and responsibilities of the Project Team and implementing partners regarding any monitoring, evaluation, and learning efforts that involve multiple activities within the project. For more information on required and suggested roles and responsibilities in monitoring, evaluation, and learning, see [Staff Roles and Responsibilities in Monitoring, Evaluation and Learning](#).

## **Recommended Steps for Developing the Project MEL Plan**

This section provides step-by-step recommendations for the Project Team when developing the initial Project MEL Plan that will be approved in the PAD.

### **BEFORE GETTING STARTED**

When developing the Project MEL Plan, the Project Team should consult the following key documents:

**Mission-wide PMP:** The alignment of the Project Purpose to a result in the CDCS Results Framework links the Project MEL Plan to the Mission-wide PMP. As such, the Project MEL Plan should reflect the priorities and information needs described in the PMP. If the Project Team revises indicators, makes updates to an evaluation plan, or changes any learning approach relevant to the CDCS and PMP, this should prompt an update to the PMP. For more information, see the [How-To Note: Prepare and Maintain a Performance Management Plan](#).

**Project Assessments or Analyses:** Any assessments or analyses conducted to inform project design should be reviewed when developing the Project MEL Plan. Analyses and assessments may help in identifying: potential learning questions; information to incorporate into a [collaboration map](#), or a graphic depicting USAID's relationships with key stakeholders; aspects and underlying assumptions of the theory of change to evaluate; performance indicators of expected results; baseline data for performance indicators; context indicators to monitor any critical assumptions or risks; and other key information to adaptively manage the project.

**Activity MEL Plans:** If there are activities already being implemented that align to the project, then existing Activity MEL Plans should contribute to the development of the Project MEL Plan. Information from the

Activity MEL Plan that may be relevant to the Project MEL Plan includes: outcome indicators that align to the project logic model, output indicators that are useful to the Project Team’s management, planned or ongoing evaluations, and learning efforts that extend beyond the scope of the activity. See the [How-To Note: Activity MEL Plan](#) for more information on developing, reviewing, and maintaining an Activity MEL Plan.

**Previous Project Documentation:** If this is a follow-on project, review documentation from the previous project (e.g., the previous Project MEL Plan, a closeout report, any evaluations of the project) and include indicators and other information that continue to be relevant.

**Documentation of Host Country and Other Donor Performance Management Information:** Where possible, USAID should align its monitoring, evaluation, and learning efforts with partner country counterparts and other donors to promote local ownership and sustainability.

**Previous PPR and the set of Standard Foreign Assistance Indicators:** The Mission’s previous PPR and the list of standard foreign assistance indicators may include indicators that are relevant to the management of the project.

## **DRAFTING THE PROJECT MEL PLAN**

- 1. Revisit the Project Logic Model:** The Project Team should revisit the project design and the project logic model and consider how monitoring, evaluation, and learning efforts may track results, check assumptions, and test the project’s theory of change.
- 2. Identify Knowledge Gaps, Learning Questions, and Opportunities for Collaboration and Adapting:** Draft learning questions that address any knowledge gaps in the project logic model. Prioritize and plan for how to answer questions. These questions may be linked to and answered by planned monitoring, evaluation, or other efforts. Consider opportunities for collaboration and adapting. For example, plan for stakeholder identification and collaboration and consider creating a “collaboration map” that identifies stakeholders and outlines how the Project Team plans to engage and collaborate with implementing partners, local governments, beneficiaries, and others during implementation. Plan for other CLA efforts that will take place during implementation, including opportunities to review and use monitoring data, evaluation findings, and other learning to adapt the project and to engage with project stakeholders on the findings.
- 3. Select and Refine Performance and Context Monitoring Indicators:** For performance monitoring, identify the key results that will require performance monitoring indicators for management or reporting purposes. Review the illustrative indicators identified in the PMP relating to the project as well as “required as applicable” standard foreign assistance indicators that may apply. For any ongoing activity that is being aligned to the project, review the Activity MEL Plan and consider if any outcome indicators are relevant and useful for project management and should be included in the Project MEL Plan. Based on the project design and logic model, and informed by the analyses conducted prior to project design, the Project Team should determine whether to retain these indicators, refine, or develop new indicators.

For context monitoring, identify the key assumptions in the project theory of change that need to be monitored. Consider other contextual factors that are critical to project success and identify ways to

monitor them.

Collect baseline data and set targets for performance indicators, or make a plan to collect baseline data and set targets. Determine triggers for action if relevant for context indicators. Determine who is responsible for collecting the data for each indicator throughout project implementation; in some cases, it may be someone on the Project Team, while in other cases it may be an implementing partner. Plan to coordinate data collection that promotes data quality, consistency, and the ability to aggregate across activities.

- 4. Consider Other Monitoring Efforts:** Identify any additional monitoring efforts to fulfill management or learning needs. In addition to a plan to monitor the operational context mentioned above, particularly in relation to the assumptions or risks identified in the project logic model, identify opportunities for non-indicator based monitoring of key project outcomes that are otherwise difficult to measure. Consider using [complexity-aware monitoring approaches](#) if applicable.
- 5. Identify Evaluation Questions and Develop the Evaluation Section:** The Program Office and the Project Team should work together in identifying the key evaluation questions, based on the gaps in knowledge that can be addressed best through an evaluation. The Program Office and the Project Team should decide if this project will be subject to a whole-of-project evaluation ([ADS 201.3.5.13](#) Evaluation Requirement #3). If there are any pilot activities that are planned to be scaled-up, these should be identified and plans made for an impact evaluation. If an impact evaluation is not feasible, a performance evaluation should be included in the evaluation section and the reason for not planning an impact evaluation should be documented ([ADS 201.3.5.13](#) Evaluation Requirement #2). The Project Team should also determine which evaluation will be conducted to meet the one evaluation per project requirement ([ADS 201.3.5.13](#) Evaluation Requirement #1). Once both required and non-required evaluations are identified, summary descriptions should be included in the Project MEL Plan. The PMP Evaluation Plan should be updated with these details.
- 6. Plan for Project Reviews:** Identify periodic moments to review project progress. Project reviews may be formal or informal depending on their purpose. It is good practice to plan for at least one project review per year. The Project Team may also find it useful to identify moments that would trigger an ad-hoc project review. Examples of such triggers might include reaching a certain milestone in implementation (e.g., meeting an expected performance target) or an unanticipated event occurring that creates an uncertain implementation environment.
- 7. Complete Any Additional Sections:** A Project Team may decide to develop additional sections to the Project MEL Plan. Examples of such sections include: roles and responsibilities, budget, or a calendar to schedule the planned performance management efforts.

## Share, Update, and Use the Project MEL Plan

The Project MEL Plan is an integral part of effectively managing a project and ensuring that stated objectives are being achieved. It should be kept close at hand, referenced often, and periodically updated.

### SHARE

Once the PAD is approved, it is good practice to treat the Project MEL Plan as a standalone document and

keep it easily accessible in centralized files of the Project Team. All members of the Project Team should have access to the Project MEL Plan. Teams may also choose to include the Project MEL Plan in the PAD when they are uploaded to ProgramNet.

It is critical that the relevant parts of the Project MEL Plan be shared with all partners who are expected to implement the project. This promotes collaboration among the project's activities and ensures that partners understand the higher-level outcomes they are expected to achieve and how progress and performance will be measured. This includes implementing partners for the project's activities and partner governments who enter into a Government-to-Government (G2G) Agreement relevant to the project.

If the Mission has an M&E or MEL support contract and the contract is expected to support the project in some way, the Project MEL Plan should also be shared with the support contract.

## UPDATE

The Project MEL Plan should be updated to maintain its relevance as a tool for managing and assessing project implementation. Some events that trigger an update to the Project MEL Plan include:

**Updating Project MEL Plans based on new or revised Activity MEL Plans:** A Project MEL Plan should be updated to include relevant information from the activities contributing to project outcomes. For example, project indicators may be added or revised, evaluations may be added, or new stakeholders for collaboration may be added. Therefore, if Activity MEL Plans are created or revised, the Project MEL Plan should also be reviewed to insure consistency and relevance.

**Project or Mission-wide Portfolio Reviews:** After each project review, the Project MEL Plan should be updated to reflect lessons learned, and any changes to the monitoring, evaluation, and learning approaches.

**Designing, Procuring, or Completing an Evaluation:** The evaluation section should reflect current plans for evaluating the project's effects. The Project Team should update the Project MEL Plan with any relevant actions from a completed evaluation's post-evaluation action plan and accompanying action tracker.

## USE

The Project MEL Plan is a critical tool that the Project Manager and Project Team use to monitor, evaluate, and learn from implementation. The main purpose of the MEL Plan is to document how and what information will be gathered, analyzed, and used to inform adaptive project management and review progress. The Project MEL Plan is a crucial link between the Mission's strategy and implementation. As such, lessons learned or management decisions that derive from these reviews should inform Mission strategic portfolio reviews and potentially trigger revisions to the PMP.

The Project MEL Plan should be used to inform the Activity MEL Plans related to the project, and vice versa, including coordination across activities and implementing partners to ensure monitoring, evaluation, and learning efforts are conducted in a consistent manner and are mutually reinforcing.

See the [Monitoring Toolkit](#), [Evaluation Toolkit](#), and [CLA Toolkit](#) for further information about using monitoring data, evaluation findings, and learning activities.