Introduction

The Performance Management Plan (PMP) Task Schedule provides a comprehensive and interactive schedule of all of the monitoring, evaluation, and Collaborating, Learning, and Adapting (CLA) tasks that will occur over the expected life of the Country Development Cooperation Strategy (CDCS) (see also an illustrative PMP Task Schedule template). The Task Schedule helps the Mission ensure that monitoring, evaluation, and CLA tasks are anticipated, delegated to responsible parties, and scheduled in such a way that they reduce the management burden on the Mission.

Schedule of Performance Management Tasks

The Task Schedule should be updated over the lifetime of the CDCS, as new monitoring, evaluation, and CLA tasks arise (including from any changes to the CDCS) and to reflect any changes in timeframes or responsibilities (see ADS 201.3.2.16). While the PMP Task Schedule is a required element of the PMP, there are no mandatory formats for the Task Schedule. Missions should choose a structure and format that best suits their needs.

Tasks that may be included in the PMP Task Schedule include:

- Establishing baselines;
- Collecting and analyzing indicator data;
- Data Quality Assessments (DQAs);
- Developing learning agendas to address knowledge gaps or examine theories of change for a specific project or activity or across the portfolio;
- Updating and revising the PMP (particularly when new projects are designed);
- Conducting Portfolio Reviews and a CDCS Mid-Course Stocktaking;
- Preparing for the Performance Plan and Reports (PPRs);
- Designing and conducting evaluations;
- Stakeholder meetings to discuss performance, changes in context, and other management needs;
- Monitoring and Evaluation (M&E) training for Mission staff and implementing partners;
- Updating Performance Indicator Reference Sheets (PIRS); and
- Conducting site visits.
Developing the PMP Task Schedule

To develop the initial Task Schedule, the PMP Team should work with the Development Objective (DO) teams to identify the key performance monitoring, reporting, and oversight tasks they expect to be engaged in over the course of the CDCS. This provides DO Teams with an overview of key PMP tasks over the life of the CDCS. Not every routine task needs to be included in the Task Schedule and DO Teams should use discretion in determining which tasks should be tracked in the Task Schedule. Tasks that require cross-office collaboration, review, and clearance, or have important dates or deadlines, can be helpful to track so everyone is aware and can flag potential conflicts in advance. Each task should have a point of contact responsible for seeing it to completion. Internal deadlines should be as realistic as possible, taking into consideration the amount of time needed to identify and collect data.

One of the key benefits of the PMP Task Schedule is to ensure cross-office coordination for monitoring tasks to minimize costs and rationalize efforts. After the Task Schedule is initially developed, all tasks should be analyzed to assess the management burden on Project Teams, DO teams, and the Program Office. This analysis should also look at opportunities to achieve economies of scale, such as combining the baseline data collection efforts of two DO teams proposing to use household-level surveys. While developing or selecting indicators, consider available Agency resources for performance indicators such as the standard foreign assistance indicators and sector/initiative-specific indicators. Also consider available Agency resources for context indicators such as the self-reliance metrics and other sources that can help inform CDCS performance and management.

Updating the PMP Task Schedule

As the CDCS is updated, project designs are completed, and project and activity M&E Plans are finalized, the PMP Task Schedule should be updated to reflect any new monitoring and evaluation tasks. The Performance Indicator Reference Sheet/Context Indicator Reference Sheet (PIRS/CIRS) serve as a good reference point for identifying any new baseline data collection needs and monitoring requirements. Timing/level of effort, delegation of roles and responsibilities, and the nature of the tasks should be assessed with regard to management burden and potential economies of scale upon updating the Task Schedule.
HOW CAN I LEARN MORE?

› PMP Task Schedule Template
› How-To Note: Prepare and Maintain a PMP
› Planning for CLA
› Establishing a Learning Agenda and Learning Agenda Template
› Engaging Stakeholders
› Evaluation Toolkit
› Additional Help: Staff Roles and Responsibilities for Monitoring, Evaluation, and Learning

For more information, please email us at mande@usaid.gov