



SCHEDULE OF PERFORMANCE- MANAGEMENT TASKS AND ASSOCIATED RESOURCES

Introduction

The Performance Management Plan (PMP) Tasks and Associated Resources section of the PMP provides a comprehensive and interactive schedule of the key monitoring, evaluation, and Collaborating, Learning, and Adapting (CLA) tasks that the Mission intends to use over the life of the CDCS, particularly to address the learning priorities identified in the PMP (see also an illustrative [PMP Schedule of Tasks and Resources](#) template). The Performance-Management Tasks and Associated Resources section helps the Mission ensure that monitoring, evaluation, and CLA tasks are anticipated, sufficiently resourced, delegated to responsible parties, and scheduled in such a way that they reduce the management burden on the Mission.

In this section, a Mission must identify the performance-management tasks it expects to conduct over the life of the CDCS and should include information on the timeline for each task, who is responsible, and an estimate of human and financial resources needed to accomplish it. Note that funding for evaluation should total one to three percent, on average, of a Mission's program funds. Program-monitoring and CLA activities could require another three to ten percent, on average, of Program funds.

Schedule of Performance-Management Tasks and Resources

The Schedule of Tasks and Resources should be updated over the lifetime of the CDCS, as new monitoring, evaluation, and CLA tasks arise (including from any changes to the CDCS or to the PMP learning priorities) and to reflect any changes in resources, timeframes, or responsibilities (see [ADS 201.3.2.15](#)). While the PMP Task and Resources section is a required element of the PMP, there are no mandatory formats. Missions should choose a structure and format that best suits their needs and may choose to use the illustrative template, or compile the information in existing Mission calendars, schedules, or budget files.

Tasks that may be included in the PMP Tasks and Resources section:

- 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 or activities are designed);
- Conducting Portfolio Reviews and a CDCS Mid-Course Stocktaking;
- Preparing for the Performance Plan and Reports (PPRs);

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- Designing and conducting evaluations;
- Stakeholder meetings to discuss performance, changes in context, and other management needs;
- Monitoring and evaluation training for Mission staff and implementing partners;
- Updating Performance Indicator Reference Sheets (PIRS); and
- Conducting site visits

The Schedule of Tasks and Resources may also include learning events, stakeholder meetings, and other opportunities to review monitoring and evaluation data. Evaluation tasks, such as writing evaluation Scopes of Work and following up on evaluation recommendations, may be included in the Evaluation Plan, prepared separately, or included as part of the overall PMP Schedule of Tasks and Resources, depending on the format that works best for the Mission.

DEVELOPING THE PMP SCHEDULE OF TASKS AND RESOURCES

To develop the initial schedule of tasks and associated resources, the PMP Team should work with stakeholders from across the Mission to identify the key performance monitoring, reporting, and oversight tasks they expect to utilize to address the PMP learning priorities and other key Mission needs. This provides the Mission 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 The Mission 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 include the estimated budget and/or human resources associated with achieving it and 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.

Helpful Hint

Some Missions have linked the PMP Schedule of Tasks and Resources to Google Calendar or other USAID scheduling calendars so that relevant staff are sent email reminders of the PMP tasks that they are responsible for completing and managing.

One of the key benefits of the PMP Schedule of Tasks and Resources is to ensure cross-office coordination for monitoring tasks to minimize costs and rationalize efforts. After this is initially developed, all tasks should be analyzed to assess the management burden on different offices across the Mission. This analysis should also look at opportunities to achieve economies of scale. For example, if the Mission proposes to use household-level surveys to address two different PMP learning priorities, they could combine the baseline data collection efforts of both 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 USAID's [International Data and Economic Analysis](#) web portal that can help inform CDCS performance and management.

UPDATING THE PMP SCHEDULE OF TASKS AND RESOURCES

As the CDCS is updated, project or activity designs are completed, and Activity MEL Plans are finalized, or PMP learning priorities evolve, the PMP Schedule of Tasks and Resources should be updated to reflect any new monitoring, evaluation, or CLA tasks. Analysis of MEL plans, the performance indicators selected to measure progress toward CDCS Intermediate Results and the Performance Indicator Reference Sheet/Context Indicator Reference Sheets (PIRS/CIRS) can serve for identifying any new baseline data collection needs and monitoring requirements. Timing/level of effort, delegation of roles and responsibilities, human and financial resource needs, and the nature of the tasks should be assessed with regard to management burden and potential economies of scale upon updating the Schedule of Tasks and Resources.

HOW CAN I LEARN MORE?

- › [PMP Task Schedule Template](#)
- › [How-To Note: Prepare and Maintain a PMP](#)
- › [Planning for CLA](#)
- › [Establish a Learning Agenda and Learning Agenda Template](#)
- › [Engage Stakeholders](#)
- › [Evaluation Toolkit](#)
- › [Additional Help: Staff Roles and Responsibilities for Monitoring, Evaluation, and Learning](#)