



Mission Order: Performance Monitoring

Mission Order Number: MO200-203-01	Series: 200
Effective Date: <i>Date of Signature</i>	Supersedes: MO200-203

I. PURPOSE

The purpose of this Mission Order is to provide Mission guidelines, procedures and recommendations related to strategy, project and activity/implementing mechanism (IM) monitoring.

II. AUTHORITY/POLICY

- [Government Performance and Results Act \(GPRA\) of 1993](#) and [Government Performance and Results Modernization Act \(GPRMA\) 2010](#) regarding government-wide requirements regarding performance management.
- [ADS 203.3.2](#) to [ADS 203.3.14](#) regarding all aspects of performance monitoring.

III. DEFINITIONS

Significant terms from the ADS for this Mission Order (MO) are:

- Performance Monitoring ([ADS 203.3.2](#))
- Mission-wide Performance Management Plan (PMP) ([ADS 203.3.3](#))
- Project M&E Plan ([ADS 203.3.4](#))
- Activity/Implementing Mechanism (IM) M&E Plan ([ADS 203.3.5](#))
- Development Objective (DO) ([ADS 201.3.3.3](#))
- Project ([ADS 201.3.11](#))
- Activity ([ADS 201.3.11](#))
- Data Quality Assessment ([ADS 203.3.11.2](#))
- Project Manager ([ADS 201.3.10](#))

Other terms include:

- Program Office (PRO) Performance Monitoring Point of Contact (PMPOC): Per [ADS 203.3.2.1](#), missions must designate a performance monitoring point of contact (PMPOC throughout this MO) within the Program Office (PRO). This individual will ensure compliance with performance monitoring across the breadth of the Mission's portfolio, and will collaborate with the DO team staff in the Mission.

- Performance monitoring information system: A data system that serves as a repository for all performance indicators (at the strategy, project, and activity/IM levels), including baseline values and timeframes, targets and rationales for targets, and actual values. Today, per [ADS 203.3.3.1](#), the PMP is in two parts: a narrative portion (in Word) and a set of tabular data stored in a performance monitoring information system (which may include Excel spreadsheets). The data in the system is dynamic and will be updated as baselines are measured, actuals are collected, and changes are made to performance indicators as laid out below. At this point in time, no one system is recommended other than using an application that allows for facile manipulation of data and reports, such as Excel or database applications.
- Contracting Officer's Representative (COR)/Agreement Officer's Representative (AOR)/Activity Manager (AM)/Government to Government (G2G) Manager: For Mission awards, monitoring responsibilities fall to the COR/AOR; for awards made in Washington (field support, Food for Peace, etc.), monitoring responsibility falls to the AM.

IV. ROLES AND RESPONSIBILITIES

All Mission Offices are responsible for the implementation of this policy and adherence to the Agency guidance and principles on performance monitoring. However, DO Teams and PRO are central to successful Mission performance monitoring. Between these offices, there must be a clear delineation of roles, and strong sense of cooperation and transparency. See [Figure 1 in ADS 203.3.2.1](#) for respective roles of these offices across various monitoring tasks. PRO is responsible for overseeing the quality of the Performance Monitoring process as outlined in [ADS 203](#), and for updating this Mission Order.

A Mission-wide Monitoring and Evaluation working group has been established and is chaired by the designee of the PRO Director. This group is composed of technical and PRO staff with primary responsibility for Evaluation and Performance Monitoring and will meet as needed.

V. PROCEDURES

A. Overview

Performance monitoring is a data-intensive and detailed endeavor. Given the sheer volume of data and number of changes—from adding, refining, and dropping indicators to updating targets and actuals—maintaining a current and authoritative PMP can be challenging. Under the Program Cycle, performance monitoring systems are inter-connected, from the mission-wide PMP to the Project monitoring and evaluation plan¹ to the Activity/IM monitoring and evaluation plan—a change in one ripples across the others (see [Figure 2 in ADS 203.3.5](#) for an illustration). As such, it is important to ensure that Activity/IM M&E plans are consistent with the Project M&E Plan and the mission-wide PMP. Activity M&E Plans (AMEP) must be in place within three months of award. At the DO level, PMPs must be in place no later than one year following DO approval.

Performance monitoring is critical to the Mission's ability to track progress toward the results identified in its CDCS results framework. The Mission-wide PMP serves as a tool to measure achievement of the CDCS results framework; the Project M&E Plan measures achievement of the Project Logical Framework (LogFrame, which is derived from the CDCS results framework). The AMEPs contribute to

¹ Project M&E Plans are part of the Project Appraisal Documents (PADs).

the Project M&E Plan and ultimately to the Mission-wide PMP, and measures achievement of portions of the Project Logframe.

It is anticipated that, at the time a Mission-wide PMP is created (4-6 months after CDCS approval) much information will still not be known. Information pertinent for performance monitoring will be refined through the project design process and updated during the course of the strategy. For instance, project designs will reveal new information that, in turn, will change indicators and targets in the Mission-wide PMP. Similarly, when Activities/IMs under the Project are designed, implementers will further refine and identify new information on realistic targets or better indicators, which in turn affects the AMEP and possibly the PMP. Beyond the set of issues in establishing the PMP and M&E plans, there is change introduced by portfolio reviews and learning, a key part of the Program Cycle, which may involve adding, subtracting, or revising indicators and targets mid-strategy. Finally, many projects will include activity/IMs that are pre-existing and must be incorporated through a portfolio alignment process (see [ADS 201.3.4.3](#)), adding more complexity to these tasks.

These procedures are designed around three major areas of navigating this complex system: good performance monitoring planning (see [ADS 203.3.2.2](#)); clear, efficient procedures during implementation when data is collected; and planning and integrating learning to improve development impact, while maintaining documentation.

B. Performance Monitoring Planning

Formulation of Mission-wide PMP

- Within 4-6 months of CDCS approval, the Mission develops a Mission-wide PMP (see [ADS 203.3.3.1](#)). The PMPOC and other staff from PRO work with technical staff to ensure that indicators for Goal, DO, and Intermediate Results (IRs) are defined using Performance Indicator Reference Sheets (PIRS). Where possible, for the Goal and DO indicators, baseline data are collected and targets set prior to initial approval of the PMP. For IR indicators, baseline data need only be planned. Where baselines and targets cannot be set at the PMP development stage, the PIRS should describe how and when the Mission will collect this information.
- Within 4-6 months of CDCS approval, the Mission should undertake a portfolio alignment process in which the PMPOC works with relevant technical staff to ensure that information for relevant existing indicators are included in the mission's new PMP and those indicators no longer needed are archived and effort to collect those data at the Mission level cease. The PMPOC should also ensure that any currently planned evaluations are incorporated into the PMP Evaluation Plan.
- The Mission Director approves the initial Mission-wide PMP, which will then serve as a base to build project and activity/IM level M&E plans. Note that the Mission-wide PMP approved by the Mission Director is not a static document, but will frequently be modified by project designs, partner feedback and portfolio reviews, etc. (see "Modifying/Updating Different Types of M&E Plans" below). Mission Director's approval is required only on the initial approval of the Mission-wide PMP and, generally not on the iterative updates made to the PMP throughout its life (see [MO on Strategy](#) for details on revision and approval procedures).
- The DO Team Leader is ultimately responsible for achievement of the targets for the high-level indicators for his/her DO.

See [ADS 203.3.3](#) and [PMP How-To Note](#) for additional details.

Formulation/Approval of Project M&E Plans

- Project Design Teams ensure that Project M&E plans measure progress toward the results specified in the Project Logframe (full Project M&E Plan is an Annex in the Project Appraisal Document's (PAD)).
- During the PAD input and clearance process, PRO confirms that Project M&E plans align with the Project Logframe and results specified in the CDCS Results Framework.
- Upon PAD approval, PMPOC updates relevant performance indicators (including Project Purpose-level indicator baselines and targets) and evaluation questions and other relevant details from Project M&E Plans in the Mission-wide PMP within three months (see [ADS 203.3.4.2](#)). If changes are made to the original PMP based on the Project M&E plan (for e.g., original IR or sub-IR indicators dropped, new indicators added), the relevant field of the Performance Indicator Reference Sheet for the changed indicator must also be modified or completed again.
- DO teams need to budget approximately three (3) to ten (10) percent of DO resources, on average, for M&E activities. On average, three (3) percent of the resources should be dedicated to evaluations, including cross-sectorial evaluations identified by PRO. The remainder of M&E funds will be budgeted to support project monitoring (e.g. field visits, PMP updates, and data collection) conducted by CORs/AORs and PRO M&E Specialists.

See [ADS 203.3.4.3](#) regarding Project M&E Plans and the [Project Design MO](#) for more details.

Formulation/Approval of Activity/IM M&E Plans

All new activities must be designed using the Project Design guidance (see [ADS 201.3.11](#)). Existing activities/IMs must be aligned with the project LogFrame (as included in the PAD) and CDCS Results Framework through the portfolio alignment process which begins during the CDCS and continues later during project design (see [ADS 201.3.13](#)). These steps ensure alignment in M&E planning among Activities/IMs, Projects and the Mission-wide PMP.

- COR/AOR/AM/G2G is responsible for the quality of Activity M&E Plans (AMEP) submitted by implementing partners, and works with implementing partners to ensure that the AMEPs are consistent with and meet the data collection needs of the Mission-wide PMP, as well as the Performance Plan and Report (PPR).² At a minimum, AMEPs submitted to USAID must incorporate the relevant indicators from the Mission's PMP and indicators that the Mission needs for activity management. This includes working with AAO (or Resident Legal Officer (RLO) and others in the case of G2G) to ensure that relevant indicators are included in solicitation documents, negotiations with host government entities, etc. before awards are made.
- DO Team Leads (or their designee) ensure that IMs include Mission-required indicators and that use of the same indicator across different IMs is consistent in definition and collection methodology. They also ensure collection of appropriate indicators and coordinate, as needed, with other USG agencies on indicators related to PPR reporting.

² ADS 202.3.5.1 directs Mission staff to ensure that implementing partners have complete information on the DO results to which their activities are expected to contribute. Such information should include the specific M-PMP, AMEP and PPR indicators and targets that should be included in the AMEP and reported on by IPs. COR/AOR/AM/G2G is responsible for working with AAO (or RLO and others in the case of G2G) to ensure that relevant results and indicators are included in solicitation documents, negotiations with host government entities, etc. before awards are made and that they are consistent with and meet the data collection needs of the AMEP and the PMP, as well as the PPR.

- PMPOC assists in this process by providing advice, official guidance and best practice, sharing information, and providing early review and advice. They use their “bird’s eye view” of data collection and performance indicators across the Mission to ensure consistency and efficiency. They also ensure the collection of any indicators that cut across offices or DOs.
- The COR/AOR/AM/G2G approves AMEPs submitted by the implementer. DO Team Leads and PMPOC clear AMEPs.
- COR/AOR/AM/G2G ensures that AMEP data are loaded into performance monitoring information system as guided by PMPOC.

See [ADS 203.3.5](#) for more details.

Collecting Baselines

The collection of baseline data should begin as soon as possible after the approval of the Activity or IM M&E plans (note that baselines for the Goal and DO levels should be collected prior to initial Mission-wide PMP approval, where possible, or details on timing and methodology for baseline data collection identified). Baseline data should establish performance targets (or revise initial targets) and used as a reference point to monitor progress toward the results outlined in the PMP and/or AMEPs.

- Given the need to rationalize data collection, COR/AOR/AM/G2G should coordinate with PMPOC and DO Team Leads to minimize baseline data collection time and cost. The Performance Monitoring and Evaluation Task Schedule in the PMP can assist in this coordination.
- The PMPOC must ensure cross-office coordination for the collection of data shared by different projects to minimize costs and rationalize efforts.
- COR/AOR/AMs/G2G, DO team leaders, PMPOCs, or others responsible for a performance indicator as described in a PIRS should enter baseline data and new/revised targets into the performance monitoring information system, with PRO approval, for the indicators for which they are responsible.

See [ADS 203.3.9](#) for more details.

Modifying/Updating Different Types of M&E Plans

As outlined above in the Overview, as projects and activities/IMs are approved, learning occurs and context changes, performance monitoring plans change as well (i.e., Mission-wide PMP, Project M&E Plans, and AMEPs). [ADS 203.3.10](#) grants broad authority to Missions to make needed changes.

However, for solid management reasons, these procedures will operationalize the following principles:

- Visibility and transparency in making changes, while delegating authority responsibly.
- Ability to trace back rationale for changes, particularly to indicators and targets, through thorough documentation to ensure that changes will be fully understood by incoming staff, auditors, other personnel and new partners.
- As a general principle, targets should not be updated more frequently than annually to incentivize good planning and analysis prior to target setting.

The following procedures will guide changes for each of the following plans. The appropriate staff member (as laid out below) should review the plan to ensure that appropriate updates have been made at least annually or as needed.

- For Mission-wide PMP:
 - The PMPOC will make all modifications to the Mission-wide PMP, as a way to ensure consistency and quality. Decision-making for PMP modifications will be inclusive, transparent and coordinated, as outlined in the following two bullets.
 - Substantial modifications are those that occur because of a change to the results framework, or learning and adapting during program implementation. These changes will be decided through the process outlined for strategy modifications (see Strategy MO), or in a formal decision-making forum, such as a portfolio review and approved by the Mission Director.
 - Routine modifications (such as the updates needed after approval or modification of an AMEP) should be made by the PMPOC in collaboration with DO teams as updated information becomes available, documenting the rationale for the change in either the PIRS or performance monitoring information system.
 - The PMPOC will establish the procedures separately in a Mission Notice; decisions to make changes will be documented appropriately as required, and the different tables will have a reference column for tracking the changes (references to decisions memos and dates); the Mission PMP accessible (read-only) in the public directory will be locked by the PMPOC to insure the integrity of the data.
- For Project M&E Plan:
 - The COR/AOR/AMs or a designee will make changes to an existing Project M&E plan, as needed. Such changes must be reflected in the Mission-wide PMP and AMEPs, as applicable, and require clearance of the DO Team Leader and PRO. Substantial changes should be decided in a formal decision-making forum, such as a portfolio review or project review.
 - COR/AOR/AMs or designee will enter changes into the performance monitoring information system as guided by the PMPOC. These changes may come from a substantial change decided per above or from changes at the Activity/IM level (see below).
- For Activity M&E Plan:
 - The COR/AOR/AM/G2G will approve changes to the AMEP. Such changes must be reflected in the Mission-wide PMP and Project M&E plan, as applicable. Changes require clearance of the DO Team Lead or a designee and, depending on the nature of the change (i.e., whether it affects an indicator reported to Washington or one included in the mission-wide PMP), the PMPOC. Changes to the IM M&E Plan that are approved by the COR/AOR/AM/G2G must be within the scope and terms and conditions of the award, and must not serve to modify the award (consult with PRO and AAO if in doubt).
 - COR/AOR/AM will enter changes into the performance monitoring information system, noting the rationale for the change as guided by the PMPOC.

To ensure visibility and transparency throughout these processes:

- PMPOC will establish a common location for all Mission-wide PMP, Project M&E plans, and AMEPs to be electronically stored in their latest version. The PMPOC will establish naming conventions and practices to make it easy to find the latest version of each plan.
- PMPOC will ensure latest Mission-wide PMP is stored in that common location.
- DO Team Leader or designee will ensure that latest Project M&E plan is stored that common location.
- COR/AOR/AM/G2G will ensure that latest AMEP is stored that common location.

Develop Data Quality Assurance Plan

Once the Mission has selected its indicators for monitoring various levels of program performance, the next step is to verify the quality of the indicator data collected. The procedures below are based on the principles that analysis of data quality should be performed by the individual closest to management while following common procedures to ensure consistency and efficiency.

- COR/AOR/AM is responsible for conducting the data quality assessments (DQAs), with the participation of the PRO M&E Specialist for indicators in their AMEP that will be reported to Washington. The COR/AOR/AM is responsible for addressing findings with the implementer and ensuring that corrective actions are taken, in collaboration with PRO, within the designated timeframe. They are assisted by the PMPOC (who provides guidance on formats, best practice, and Agency and Mission requirements) as well as by the DO Team Leader. All completed DQAs must be signed by PRO and submitted for permanent records and follow-up.
- DO Team Leaders or their designees are responsible for ensuring the comparability of data for the same indicator collected by different mechanisms and performing DQAs for indicators in the Project M&E plan that will be reported to Washington that are not collected by activities (e.g. data from third-party sources, host country government, etc.) They should ensure that COR/AOR/AM/G2G is on track for conducting DQAs and following up on corrective actions.
- PMPOC is responsible for conducting the DQA of indicators that will be reported to Washington in the Mission-wide PMP that are not contained in Project and Activity/IM M&E Plans. The PMPOC is responsible for ensuring that the mission-wide PMP section on data quality assessment procedures includes the following information: 1) common Mission formats for DQAs (see [recommended DQA checklist](#), Attachment 1), 2) a common location for approved DQAs, and 3) Mission-specific procedures and best practices for conducting DQAs.
- The PMPOC has the responsibility to ensure that the Mission tracks important findings and follow-up actions from DQAs.

See [ADS 203.3.11](#) for more details regarding when DQAs are required and filing requirements.

C. Data Collection, Oversight, and Quality Assurance

Conduct Activity/IM Oversight

COR/AOR/AM/G2G, in coordination with DO Team Leaders, should plan for ongoing and routine monitoring and oversight of activities. Routine Activity/IM oversight includes:

- Site Visits.
 - COR/AOR/AM/G2G should perform site visits as part of their contract and grant oversight, but also to learn, verify data, and other purposes. Site visits should be planned at least once a quarter and a schedule should be maintained by the DO Team Lead or designee. COR/AOR/AM/G2G should log their site visits through the mission's centralized trip planning or such similar system.
 - The COR/AOR/AM/G2G should complete the standard [Activity Site Visit Report template](#) (Attachment 2) following every site visit, and keep a copy in their official activity/IM management files with an explanation of both positive and negative findings and required follow-up actions. Site visit reports must also be filed on the mission's centralized trip planning or such similar system, and accessible to PRO and FMO.
 - During site visits, COR/AOR/AM/G2G should conduct data verification. They should select one indicator (or more) on which the partner has reported, and check the partner's

understanding of the indicator, data collection methodology, reporting chain, and supporting documentation. The COR/AOR/AM/G2G should also take this opportunity to ask the partner whether there are any observations, findings or concerns beyond what the data capture that should be discussed at this time. For activity/IMs that have environmental mitigation measures, COR/AOR/AM/G2G should verify that these are being carried out correctly.

- The COR/AOR/AM/G2G should note any performance problem pertaining to schedule, cost, quality and/or non-compliance, as well as any other significant issues. The COR/AOR/AMs should bring any significant performance problem to the immediate attention of AAO to discuss resolution, and should also inform the DO Team Leader to discuss potential impact to the project. CORs should document contractor performance problems in the CPARS system. G2G Managers would bring performance issues to PRO/RLO/Controller. Any legal compliance, ethical or other similar problems noticed or discussed during the site visit should be brought to the attention of the RLO.
 - The COR/AOR/AM/G2G should also note any new information or learning that could usefully be shared within the Mission and/or with other partners within the project. Where monitoring and oversight suggest that implementation is yielding different results than anticipated, the COR/AOR/AM/G2G should initiate discussions with implementing partners (in the case of A&A awards such discussions must include the CO/AO) and USAID staff to analyze this divergence for what can be learned and for indications that course correction in implementation may be necessary to yield better results. For A&A Actions, only the CO/AO is authorized to approve any course correction in implementation that goes beyond the scope and other terms and conditions of the award.
 - PRO will establish a centralized storage of site visit reports and a monitoring system for the visits; PRO will review the content of the reports and monitor the implementation of recommendations.
- Meeting with Stakeholders:
 - COR/AOR/AM/G2G and DO Team Leads or their designees should also meet with partner(s), sector experts, donors, host government (see [ADS 202.3.6.2](#)) to triangulate and share information as well as review activity level progress.

Collect and Record Data

Indicator data, which may come from implementing partners as well as through primary data collection or secondary sources, must be updated in the performance monitoring information system.

- COR/AOR/AM/G2G is responsible for ensuring timely data collection of performance data along the schedule outlined in the award agreement and Activity/IM's M&E plan (quarterly, semi-annual or annual), as well as for verifying implementing partner performance reports and working with implementing partners and others in the Mission as needed, to resolve data collection or quality issues.
- COR/AOR/AM/G2G, upon reviewing the data in implementing partner reports or third-party sources and deeming it to be of acceptable quality through adequate quality assessment/certification, should enter/verify performance indicator actual values into the performance monitoring information system.
- DO Team Leaders or their designees should periodically review Project performance data, checking for consistency and quality across activities.
- PRO is responsible for ensuring that DO Team Leaders or their designees and COR/AOR/AM/G2G collect and review indicator data consistently, and that these data are entered in the performance monitoring information system on a timely basis. PRO will

periodically review COR/AOR/AM/G2G indicator data to ensure data quality and consistency. PRO may also engage in data collection as needed and appropriate (e.g., indicators collected directly by Mission staff or third-party data in the PMP).

- For each Activity/IM, COR/AOR/AM/G2G will report in the performance monitoring information system the geographic location in which the Activity/IM is operating. COR/AOR/AM/G2G should seek to report at as fine a level of detail as is practical on the location of Activity/IM operations. For example, if USAID is delivering services to specific schools, it would be optimal to capture the GPS coordinates of the specific schools; absent that, the name of the town; absent that, the district; absent that, the governorate.

D. Performance Data Analysis, Utilization, and Learning

Monitoring is an ongoing process of using data to track progress at all levels of a Mission's program. Much time and effort is expended establishing a performance monitoring infrastructure, but often much less time is spent utilizing those data to understand performance, test development hypotheses, question assumptions and cause and effect relationships and, ultimately, manage for results and learning. To ensure that data analysis and learning occur, it is important to plan for it effectively. Per [ADS 203.3.2.2](#), data analysis and learning should be planned, participatory, and transparent. These procedures operationalize these principles.

Activity/IM, Project/DO, and Portfolio Reviews

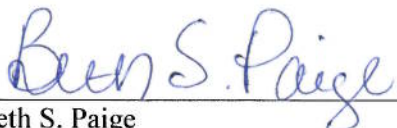
Periodic reviews of the Mission portfolio are necessary for the Mission to understand its progress toward the desired results outlined in its CDCS Strategy and Project Logframes. Such reviews are where all of the effort to collect and maintain performance data pay off, as these reviews should be intensively informed by such data. These reviews include:

- Activity/IM Reviews: COR/AOR/AM/G2G, once they have verified implementing partner periodic reports (quarterly/semi-annual/annual), should analyze the information, and determine if any changes are necessary to workplans, budgets, and/or schedules. These analyses can be done informally, in collaboration with the relevant stakeholders such as the implementer, host government staff, other COR/AOR/AM/G2G, PMPOC or other M&E specialists, as desired. Any changes to workplans, budget and/or schedules for A&A awards must be within the terms and conditions of the award. Only the CO/AO is authorized to make changes that result in modifications of the award.
- Project Reviews: The DO Team Leader or designee should conduct Project Reviews with COR/AOR/AM/G2G, in collaboration with the partners, M&E POC(s), Initiative managers (as identified), and PRO. Such reviews must be held at least semi-annually. Each semi-annual review will be timed to inform the DO-level Portfolio Review, Quarterly Financial Reviews, or PPR, as appropriate. The DO Team Leader or designee should document performance relative to the Results Framework, issues (e.g., budget, performance, or otherwise), successes/failures/lessons learned, and next steps.
- Stakeholder, Host Government, and Sectoral Reviews: As needed, the DO Teams and/or PRO should conduct reviews with stakeholders, host government partners, or technical sectors. Such reviews improve communication, and can strengthen the quality of collaboration and ultimately development impact.
- Portfolio Reviews: PRO, at least annually, must coordinate a Mission-wide review of the DOs (see [Portfolio Review MO](#), [ADS 203.3.12](#), and [ADS 202.3.6.3](#) for more details).

If any of the reviews triggers a change in the performance monitoring information system, see section above regarding modifying performance monitoring plans.

VI. EFFECTIVE DATE AND CANCELLATION

This Mission Order is effective upon signing by the Mission Director and will remain in force until cancelled or amended.



Beth S. Paige
Mission Director
USAID/Jordan

Date:



Attachments:

1. Recommended DQA checklist
2. Activity Site Visit Report template

Attachment 1 - Data Quality Checklist

USAID Mission or Operating Unit Name:	
Title of Performance Indicator: <i>[Indicator should be copied directly from the Performance Indicator Reference Sheet]</i>	
Linkage to Foreign Assistance Standardized Program Structure, if applicable (i.e. Program Area, Element, etc.):	
Result This Indicator Measures (i.e., Specify the Development Objective, Intermediate Result, or Project Purpose, etc.):	
Data Source(s): <i>[Information can be copied directly from the Performance Indicator Reference Sheet]</i>	
Name of Activity and Partner/Contractor Who Provided the Data: <i>[It is recommended that this checklist is completed for each partner that contributes data to an indicator– it should state in the contract or grant that it is the prime’s responsibility to ensure the data quality of sub-contractors or sub grantees.]</i>	
Period for Which the Data Are Being Reported:	
Is This Indicator a Standard or Custom Indicator?	<input type="checkbox"/> Standard Foreign Assistance Indicator <input type="checkbox"/> Custom (created by the OU; not standard)
Where is this indicator reported?	<input type="checkbox"/> Mission PMP <input type="checkbox"/> Mission PPR <input type="checkbox"/> Other (specify)
Is this indicator being reported under other activity(ies)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, list the activity(ies)	
If yes, confirm the definition and data collection methodology is uniform amongst all activities?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Data Quality Assessment methodology: <i>[Describe here or attach to this checklist the methods and procedures for assessing the quality of the indicator data. E.g. Reviewing data collection procedures and documentation, interviewing those responsible for data analysis, checking a sample of the data for errors, etc.]</i>	
Date(s) of Assessment:	
Assessment Team Members:	
<p style="text-align: center;"><i>USAID Mission/OU Verification of DQA</i></p> <p>Team Leader Officer approval</p> <p>X_____</p>	
<p>Jordan/PRO Clearance</p> <p>X_____</p>	

Category	Y	N	Not Applicable/ Insufficient information	Comments
DQA Methodology				
Was the DQA based on an assessment of actual reported data? If no, please explain why actual data were not utilized.				
Was reviewed supporting documentation selected through a random sampling methodology specified or approved by the USAID assessor? If yes, please describe the sampling methodology. If no, please describe the methodology used for selecting supporting documentation for review.				
Are there important gaps or limitations in the DQA methodologies used for this assessment? If yes, please describe in the comments.				
Validity				
Does the indicator reflect the intended results of the activity – i.e. is it a useful indicator for activity management?				
Do the data being collected and reported match the intent or language of the indicator?				
Are the data collection methods (interviews, observation, etc.) appropriate to produce good data?				
Are the data collection procedures and/or sources relatively free of bias?				
Are the people collecting the data qualified and/or adequately experienced?				
Are the people collecting the data properly supervised?				
Reliability				
Are the definitions and procedures for data collection, calculation and reporting clear and well understood by all relevant staff?				
Do the definitions and procedures for collecting and calculating the data match the Mission PIRS if applicable?				
If not, please describe the differences.				
Are data collection and analysis methods documented in writing in a PIRS?				
Is a consistent data collection process used from (describe any changes/differences observed if N): Year to year?				
In all activity locations/sites?				
By all activity partners/sub-contractors?				
Are there procedures in place for periodic review of data collection, maintenance, and processing that can detect data quality issues?				

Category	Y	N	Not Applicable/ Insufficient information	Comments
Has the partner identified significant data quality limitations in the past?				
Were these communicated to USAID? If yes, describe how.				
Have these data quality limitations been addressed by the partner? If yes, explain how.				
Has the partner identified significant data quality limitations in current data? If yes, please describe.				
Are these limitations described in the indicator PIRS or written data collection and analysis procedures? If yes, please describe.				
Are these limitations described in reporting to USAID? If yes, please describe.				
Timeliness				
Are the data for this indicator reported to USAID by the method (ex. Quarterly Performance Data Table) and frequency required?				
Is this format and schedule appropriate for project/activity management? If no, describe how it should be changed,				
Precision				
Is there a method for detecting duplicate data? If yes, please describe.				
If there is duplication of data, is the level of duplication acceptable for this indicator? Describe why or why not.				
If there is unacceptable duplication of data, is it identified in the PIRS under data limitations or another section?				
If there is unacceptable duplication of data, has information on duplication been shared with USAID? Describe how.				
Is there a method for detecting missing data? If yes, please describe.				
If there are missing data, is the level acceptable for this indicator? Describe why or why not.				
If there are unacceptable amounts of missing data, is this identified in the PIRS under data limitations or another section?				
If there are unacceptable amounts of missing data, has information on missing data been shared with USAID? Describe how.				
Are the reported data disaggregated according to USAID guidance?				
Integrity				
Are there procedures in place to check for transcription errors at all levels of the data collection and reporting system?				

Category	Y	N	Not Applicable/ Insufficient information	Comments
Are there proper safeguards in place to prevent unauthorized changes to the data?				
Are there procedures in place to ensure unbiased analysis of data and subsequent reporting?				
Are their safeguards in place to ensure that all relevant tools, tracking sheets and data are backed up and protected from data loss?				

IF NO DATA ARE AVAILABLE FOR THE INDICATOR	COMMENTS
If no recent relevant data are available for this indicator, why not?	
What concrete actions are now being taken to collect and report these data as soon as possible or on schedule?	
When will data be reported?	

SUMMARY (where multiple items are listed by the assessor in each row, they should be numbered so that it is clear what recommendations apply to which limitations)
Based on the assessment above, what is the overall conclusion regarding the quality of the data?
What limitations, if any, were observed and what actions should be taken to address these limitations?
Partner responses to DQA findings above:
Final agreed upon actions and timeframe needed to address limitations prior to the next DQA (given level of USG control over data):

Attachment 2 - Activity Site Visit Report Template

USAID/ Jordan Site Visit Monitoring Report Part 1				
Project Title:				
Project No:				
Date(s) of Trip:	To: (mm/dd/yy)		From: (mm/dd/yy)	
Purpose of Trip:				
Site(s) Visited:				
Person(s) on Trip:				
Person(s) Contacted:				
Field Visit Activities:				
Summary of Notes/Findings/Observations:				
Principal Follow Up Actions and Timeline:				
Part II (explain any negative findings)				
Yes/No	Are there any major concerns with implementation?			
Explanation:				
Yes/No or N/A	Is the project site and any associated commodities appropriately marked?			
Explanation:				
Yes/No	Does the project have adequate data collection/transfer/storage procedures in place?			
Explanation:				
Yes/No or N/A	Are environmental compliance procedures being followed?			
Explanation:				
Yes/No	Are gender issues being taken into consideration?			
Explanation:				
Yes/No	Are there opportunities for public outreach or to document project success?			
Explanation:				
Yes/No	Did you take pictures for the Mission's photo library and provide them to PRO?			
Explanation:				
Yes/No or N/A	If you met with local officials, what was their feedback about the project (positive and/or negative)?			
Explanation:				
Yes/No or N/A	If you met with beneficiaries, what was their feedback about the project (positive and/or negative)?			
Explanation:				
Compiled by:			Date:	
Submitted to FMO and PRO			Date:	

Clearances: Mission Order on Performance Monitoring

DRAFTED:

PRO: BZaidan /ABouazza Date 05/29/14

CLEARANCES:

A/ PRO: MYassien	Draft	Date 07/06/2014
A/WRE: CDege	E-mail	Date 07/14/2014
A/EDE: SWilcock	E-mail	Date 07/13/2014
A/EDY: LCohen	E-mail	Date 07/13/2014
FPH: SBlanding	E-mail	Date 07/14/2014
DRG: JDunlop	Draft	Date 07/14/2014
MEO: AAlHmoud	_____	Date _____
Gender POC: GKara'	E-mail	Date 08/03/2014
FMO: RShire	E-mail	Date 07/13/2014
A/RLA: MFittipaldi	E-mail	Date 07/13/2014
AAO: RRabie	E-mail	Date 07/17/2014
A/EXO: AMcGillicuddy	E-mail	Date 08/04/2014
DDIR: DBall	Draft	Date 07/15/2014