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Monitoring and Evaluation
Support Project

Developing AMELPs and Documenting PIRS for Implementing Partners

Mrs. Rasha Al-Akkad



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By the end of this workshop, participants will be able to:

- Understand key USAID M&E terms
- Distinguish between the different levels of MEL planning at USAID Jordan
- Identify the main components of Activity Monitoring and Evaluation Learning Plans (AMELPs)
- Work with other staff members to document Activity Performance Indicator Reference Sheets (PIRS)



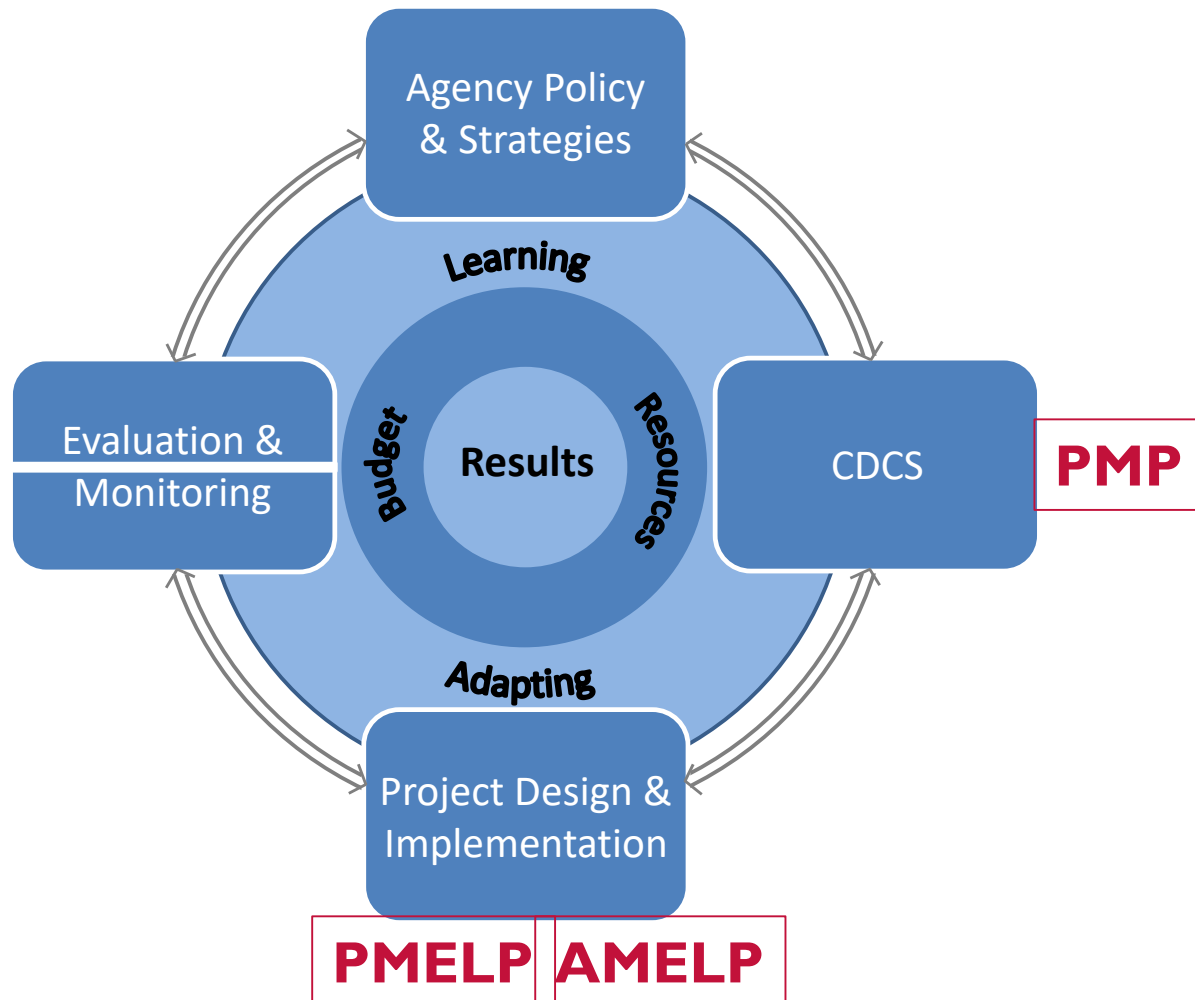
EXERCISE : Definitions and Acronyms



AMELP	IPs	DQA
PIRS	CDCS	PMP
DO	AOR/COR	TOC



Performance Monitoring in the USAID Program Cycle





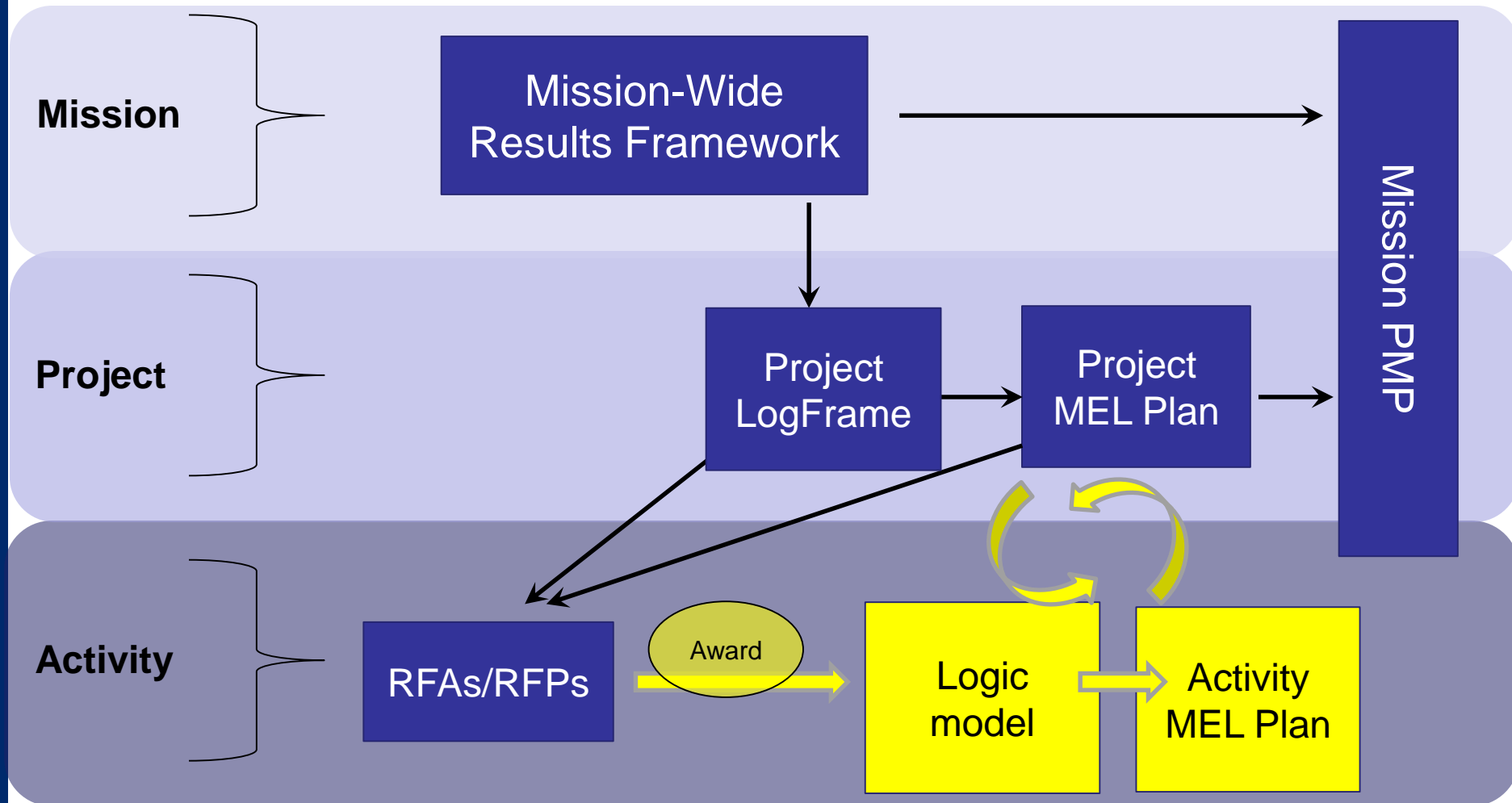
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VIDEO:



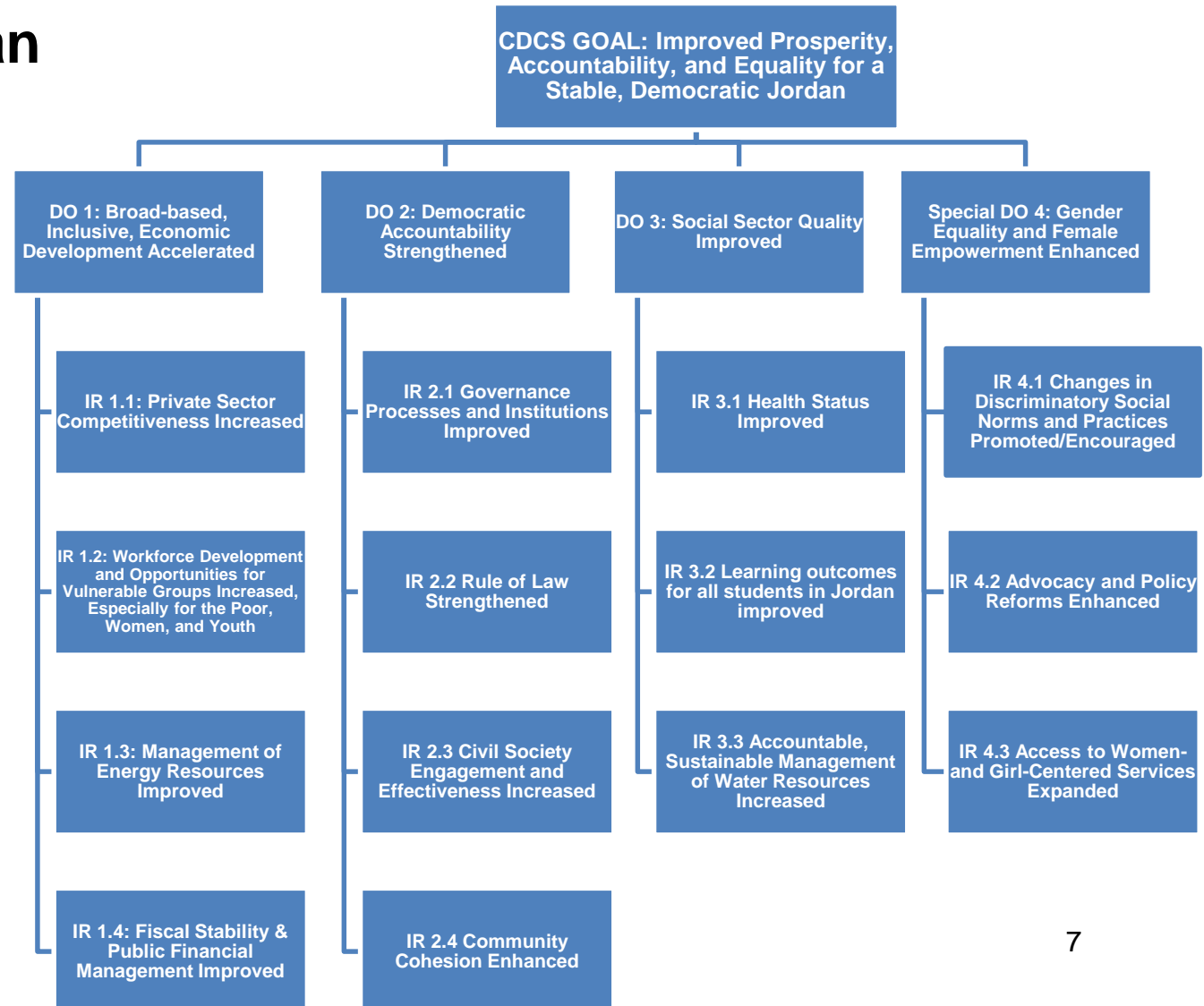
Key Mission Planning & Performance Monitoring Tools





USAID/Jordan Results Framework

Most Mission-required
indicators for activities
are listed in these RF





What is an AMELP?

- A tool for planning MEL at the Activity level
- It describes how the Activity-level results contribute to the Mission CDCS/PMP
- It presents details of the partner's MEL system
- It is developed within 90 days post award and before Activity implementation
- It describes 'How' and 'Why' the IPs activities will produce desired change, and how this change will be identified and measured.

Tells the “story” of the activity!



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Relationship of Project and Activity MEL Plans to the PMP

	Mission PMP	Project MEL Plan	Activity MEL Plan
What?	Mission-wide tool to plan and manage the process of monitoring, evaluating, and analyzing progress toward achieving results in the CDCS and Project LogFrame	Tool to measure progress toward planned results in the Project LogFrame; serves as MEL framework for all activities contributing to a project	Tool for planning monitoring and evaluation at the activity/ implementing mechanism level
When?	4-6 months, following CDCS approval	During project design, as an Annex to the PAD	Within 90 days post-award, before activity implementation
Who?	Mission Staff	Project Team	Implementers



Recommended Elements of an AMELP:

1. Introduction to the Activity MEL Plan
2. Theory of Change
3. Logic Model
4. Collaborating, Learning, Adapting (CLA) Plan
5. Performance Indicators and PIRS
6. Baselines and Targets
7. Data management, reporting and data quality assurance
8. Gender Aspects
9. Evaluation Plans and Questions
10. MEL Calendar
11. Performance Data Table (PDT)



1. Introduction to the Activity MEL Plan

- Purpose of the MEL plan
- Activity description
- Target beneficiaries
- Anticipated results
- Activity location and institutional context
- Critical assumptions



2. Theory of Change

- Describes theory of change, logic, and causal relationships between results in a framework needed to achieve a long-term goal
- Defines critical assumptions



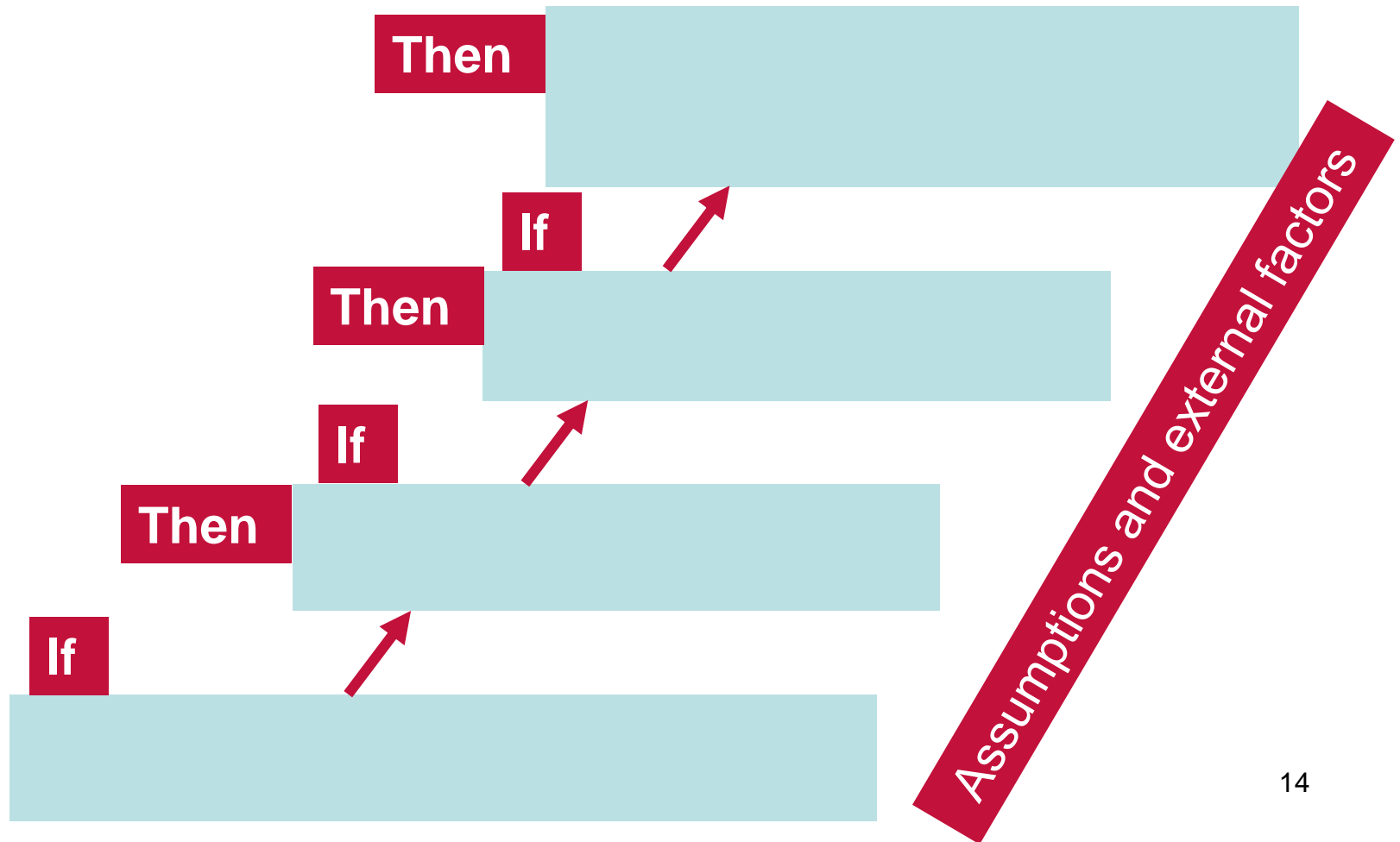
EXERCISE: What is the development hypothesis?

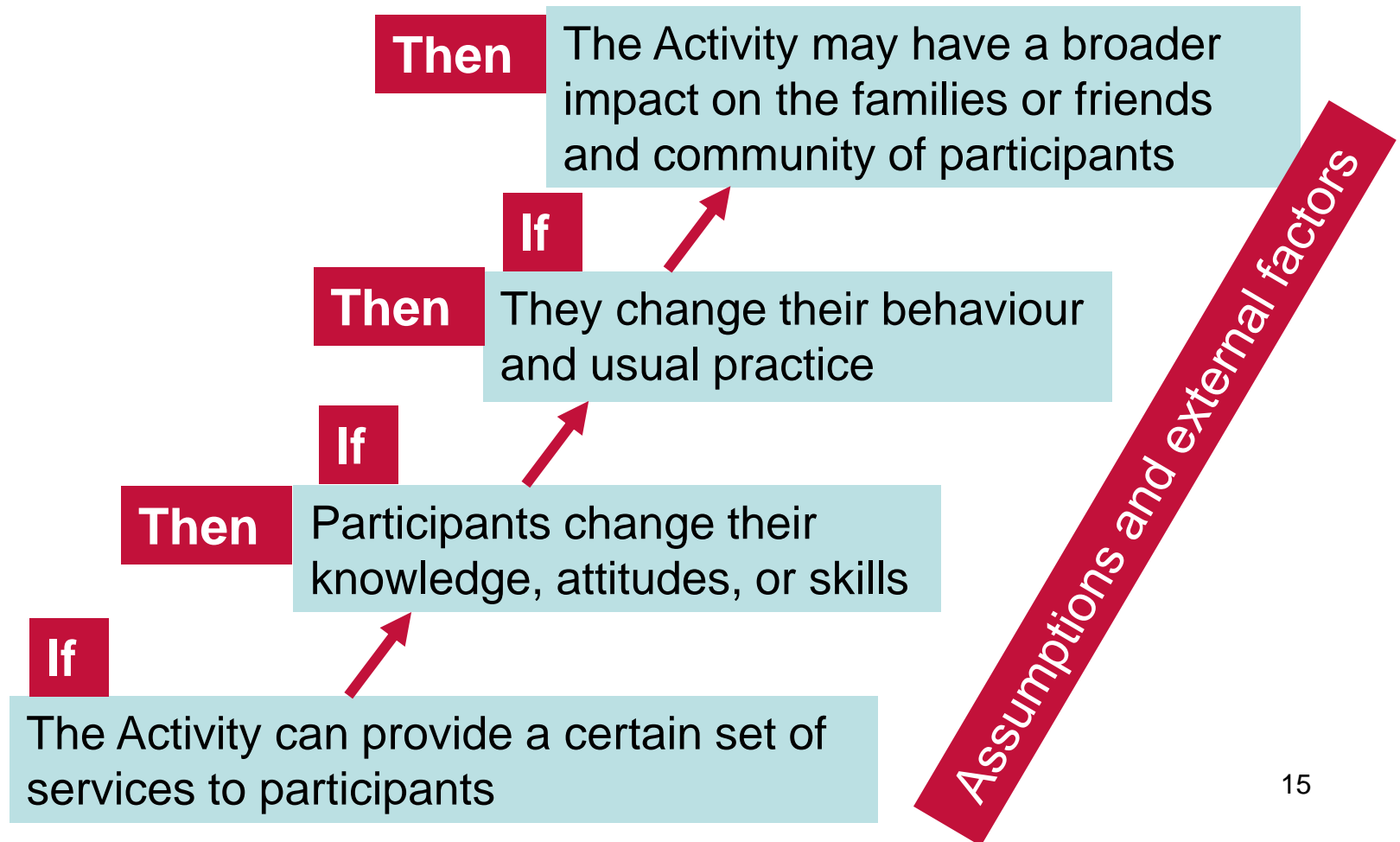
The Activity may have a broader impact on the families or friends and community of participants

Participants change their knowledge, attitudes, or skills

The Activity can provide a certain set of services to participants

They change their behaviour and usual practice

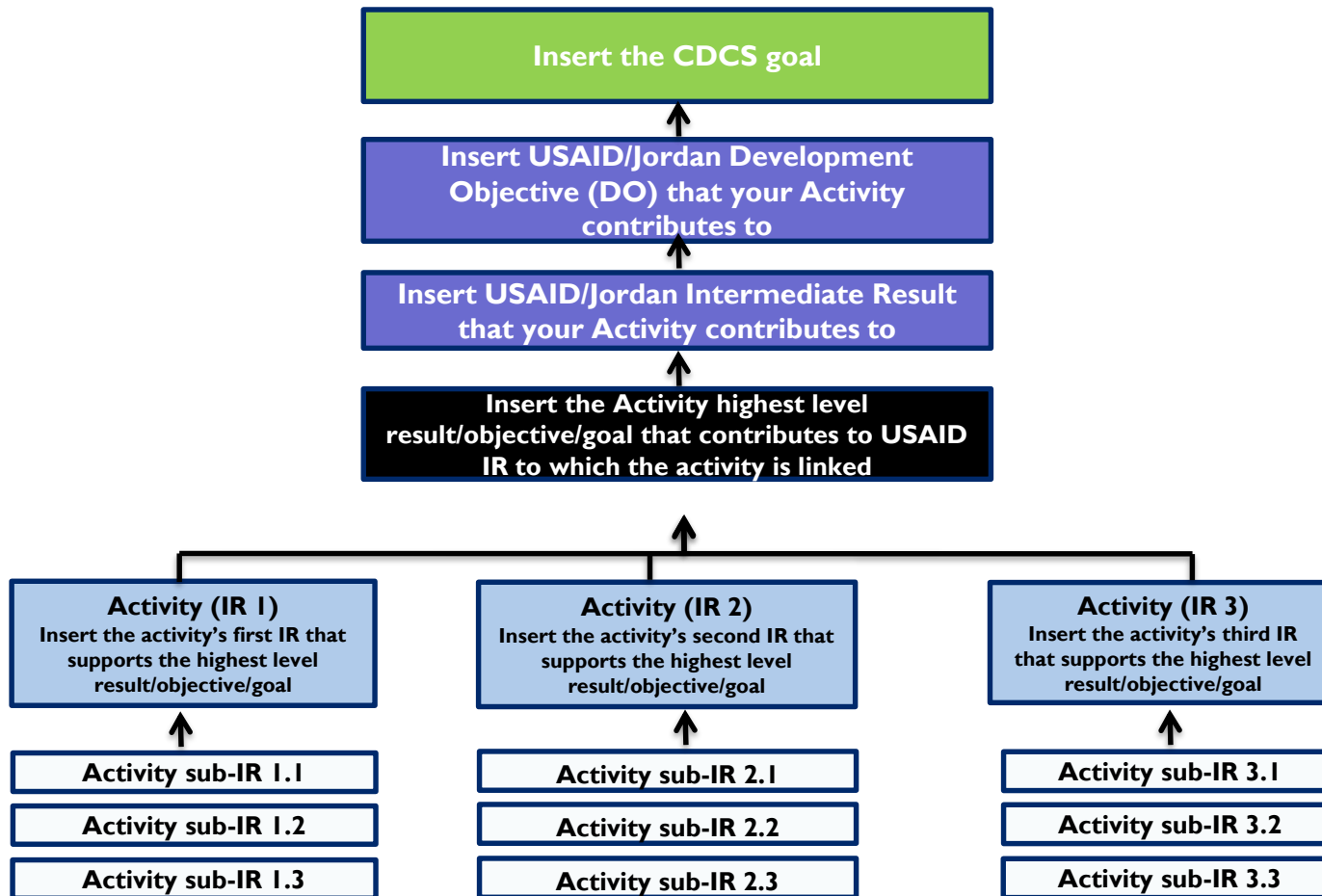






3. Logic model

- Illustrates the Theory of Change, the intended results and relationship between results and sub results.
- Illustrates the linkage to the Mission's Results Framework
- Written in “results language”



Critical Assumptions:

General conditions under which the development hypothesis for achieving the objective will hold true. Critical assumptions are outside the control or influence of USAID implementing partners (i.e., they are not results), but they reflect conditions likely to affect the achievement of results in the Results Framework.



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Activity Level



Mission Level

4. Collaborating, Learning, Adapting

- A set of practices to improve our development effectiveness
- Two dimensions: CLA in the Program Cycle and Enabling Conditions
- How to begin?
 - Explore the CLA Framework at: <https://usaidlearninglab.org/qrg/understanding-cla-0>
 - Select most meaningful sub-elements to your Activity
 - Do not create a plan for every sub-element!
 - Be specific, with clear action plans
- There is no one-size fits all approach to CLA





5. Performance Indicators

Two types of performance indicators in USAID systems:

1. “Standard Foreign Assistance” indicators (F indicators):

- Standardized definition, unit of measure and data source via the indicator handbook
- Primarily for USAID reporting purposes (e.g. Annual PPR)
- Produce data that can be aggregated across Missions

Example:

1.2.1.a Number of persons receiving new employment (including better self-employment) as a result of participation in USG-funded workforce development programs (F) 4.6.3-2



5. Performance Indicators

2. Custom indicators:

- Will only reflect progress within each country or activity context.
- More directly measures achievement of Activity results
- Most useful for managers in the field.

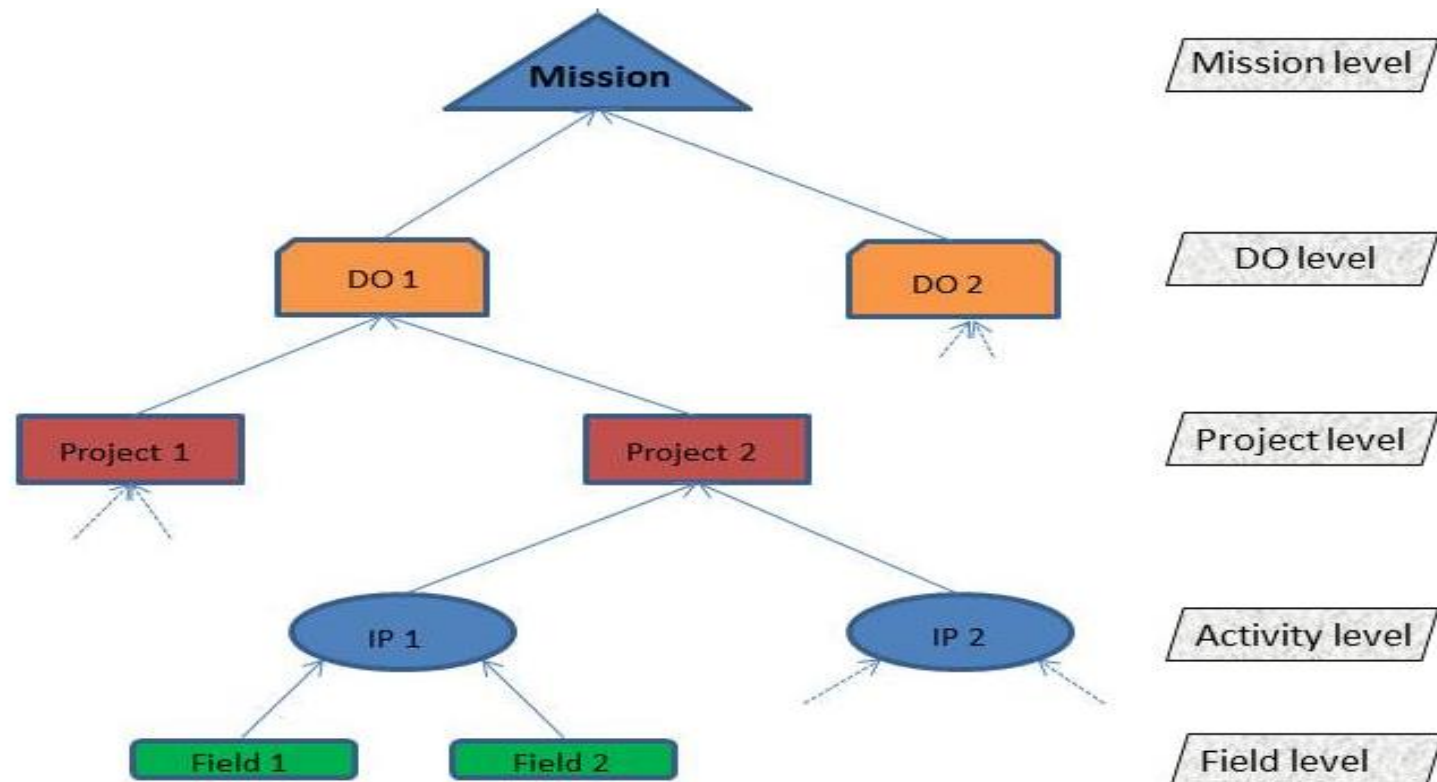
Example:

3.1.1.c Number of counselling visits for FP/RH as a result of USG assistance.

USAID/Jordan custom Mission indicator



Most Performance Indicator Data Comes from IPs/Activities





Performance Indicators for Activity XYZ

An AMELP should include:

- Mission required F indicators
- Mission required indicator (PMP, Project, Cross Cutting)
- Any additional indicators that will help USAID manage, learn from, or otherwise monitor the activity
- Additional indicators that will help the implementing partner manage its own performance



Performance Indicator Reference Sheet (PIRS)

- A Performance Indicator Reference Sheet (PIRS) is a comprehensive record of a given performance indicator
- PIRS tell the **precise definition** of an indicator, how, and how often the data for that indicator will be collected, as well as the **rationale** for selecting the indicator

USAID/Jordan Activity Performance Indicator Reference Sheet (PIRS)**IDENTIFICATION****Linkage to Mission Results Framework:****Name of Activity Result Measured (Goal/IR/sub-IR):****Indicator Name and Number:****Indicator Type:** ☐ **Activity Custom** ☐ **Standard F** ☐ **Mission PMP****Is this a PPR indicator?** ☐ **No** ☐ **Yes, for Reporting Year(s)****DESCRIPTION****USAID Definition (for Mission and F indicators):****Precise Definition:****Unit of Measure:****Method of Calculation:****Disaggregation:****Location Reporting Level:**
(select only one)☐ **Location or Facility** *(please attach GPS Coordinates)*
☐ **District**☐ **Municipality**
☐ **Kingdom****Management Utility:****PLAN FOR DATA COLLECTION****Data Collection Method:****Data Source(s):****Timing/Frequency of Data Acquisition:****Individual Responsible at Activity (title):****Location of Data Storage:****PLAN FOR DATA ANALYSIS, REVIEW, & REPORTING****Data Review & Analysis:****Reporting of Data:****DATA QUALITY ISSUES****Date of Past Data Quality Assessment:****Known Data Limitations:****Actions Taken or Planned to Address Data Limitations:****BASELINE & TARGETS****Baseline Timeframe/Notes:****Rationale for Targets/Notes:****CHANGES TO INDICATOR & OTHER NOTES****Changes to Indicator:****Other Notes:****THIS SHEET WAS LAST UPDATED ON:** / /**PERFORMANCE DATA TABLE**



6. Baselines and Targets

A Baseline is:

- The value of the performance indicator before the implementation of activities.

Different Baseline scenarios:

Baseline is already established	A previous implementer, USAID or a government agency, <i>e.g.: National unemployment rate.</i>
Baseline must be collected	When no data exists, you may have to collect it prior to implementation, <i>e.g.: Percentage of teachers who use ICT for education purposes.</i>
Baseline is zero	If the indicator is related to a specific activity, <i>e.g.:</i> Number of classes equipped with smart whiteboard.



What is a Target:

- “The specific, planned level of result to be achieved within an explicit timeframe with a given level of resources.” *(ADS 203.3.9)*
- Rationale for setting targets:
 - Historical trends
 - Achievements of similar Activities
 - Resources level
 - Expert judgment
 - Life cycle of the project
 - Implementation approach
 - International standards



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7. Data Management, Reporting and Data Quality Assurance

Describe MEL tasks with roles, responsibilities, frequency and timeline for:

- Data collection and management
- Data management tools and formats (database, spreadsheets, GIS)
- Producing reports
- Review of data at all stages.
- IP Data Quality Assessment (DQA) procedures



Process for MEL Data Management and Utilization

There should be an AMELP narrative that describes how the IP and USAID will use MEL data for decision-making

- Processes of data management described
- Processes for data reporting described
- MEL and reporting tasks and responsibilities described
- Activity's MEL structures and functions described
- Processes for data quality assurance described
- Other?



8. Gender Aspects

- Describe in what ways gender disparities will be addressed in the MEL plan
- USAID Jordan Gender Assessment 2012 identifies gender disparities by sector

Performance monitoring requirements:

- All people-level indicators must be sex-disaggregated in their data collection, analysis, and reporting



8. Gender Aspects

- USAID has developed guidance for Gender Assessment content and methods (*ADS 205, Integrating Gender Equality and Female Empowerment in USAID's Program Cycle*)
- Indicators should be aligned with the Special DO 4 (Gender Equality and Female Empowerment Enhanced)
- Guidance from “How to Note”: Gender Integration in Performance Plans and Reports
- Learning Lab course: Gender 101: Gender Equality at USAID



Integrating Gender

Sex disaggregated indicators:

- Number of people attending the training (M/F)

Gender Sensitive indicators:

Activities should examine if there could be different effects on different sexes as a result of their programs

- Number of new female business owners (*instead of # of new businesses owners disaggregated by sex*)
- Percent of men who participate in joint-decision making around reproductive health issues



9. Evaluation/Learning Plan and Questions

- What is the proposed (expected) evaluation type? Is the activity appropriate for an impact evaluation or a performance evaluation?
- If an impact evaluation is possible, does the AMELP set the baselines and collect data in such a way so as to support an eventual impact evaluation?
- What is the estimated start date and the estimated end date (completion of evaluation report)?
- The Mission will decide the type of evaluation, when and who will do it.



9. Evaluation/Learning Plan and Questions

- Possible evaluation questions:
 - To what extent where the original assumptions used for the development approach sound?
 - What was the overall effect of the activity?
 - What could the activity have done differently to increase its impact?
 - To what extent are the outputs/deliverables consistent with what was agreed in the workplan?
 - What were the steps taken to address the gender inequities?



10. MEL Calendar

- Outlines when the various MEL tasks described in the AMELP will be completed
- Should include all expected events where:
 - Performance information will be reported or reviewed
 - Important decisions about program strategy and activities will be made



10. MEL Calendar - Example

Event	Date/Duration	Comments
Baseline panel survey of host communities	Q1 FY2014, November 2013/ 45 day span, 22 days LOE	Sub-contracted to local firm who will define sample size based on TOR
Develop beneficiary selection guidelines; interview manual and questionnaire	January 2014/ 30 day span, 10 days LOE	MEL staff assisted by Home Office experts
Baseline assessment of beneficiaries	Q3 FY 2014/ 30 day span, 60 days LOE (3 interviewers)	TBD
Quarterly Report Preparation	January 2014, April 2014, July 2014, October 2014, January 2015...	Senior MEL with COP review



11. Performance Data Table (PDT)

- Updated as indicator information changes
- Includes most recent indicator data available for the time period (quarterly and cumulative)
- USAID required indicators clearly identified
- Includes all required disaggregation
- Includes baselines and targets
- Word or Excel table included in body of quarterly reports, or as an annex



11. Performance Data Table (PDT) - Example

#	Indicators	Disaggregation	Baseline Year (USFY)	Baseline Value	Q1 FY 2014 Actual Oct-Dec 2013	Q1 FY 2014 Comments	FY 2014 Target	FY 2014 Actual	FY 2015 Target	FY 2016 Target	LoP Target	Actual to Date
Goal: Project supported MACs perform targeted public sector functions more effectively (under USAID/Country DO1)												
1-1	% of surveyed procurement system participants that agree or strongly agree that GOX Procurement System is "relatively corruption free"	N/A	2013	23	-	Survey will be repeated next fiscal year	-		30	-	30	23
1-2	\$ value of actual cost savings in payment expenses achieved in mobile money salary payments with project support(in thousands)	N/A	2012	0	18.2	Additional cost savings will come as mobile money is scaled up at MoX with project support in subsequent quarters	1,599		-	-	1,599	18.2
1-3	# of MACs that have achieved passing score on key FM process self-assessments (payments, check management, cash management, deposits and revenues)	N/A	2013	0	0	The first round of FM process assessments should be completed in all Wave 1 MACs by the end of Q2	3		8	14	14	0



When Should AMELPs Be Updated or Modified?

- When unknown or missing information becomes available
- When the work plan changes
- When priorities for highlighting results shift
- When the Mission's RF and/or Indicators change
- When current AMELP indicators aren't appropriate

AMELP is
a living
document

All changes to the AMELP should be in an AMELP change-log



AMELP Change Log - Example

No	Source document version and/or date	Description as listed previously	New description	Date approved	Comments/Justification



Final Thoughts...

- Performance monitoring systems are inter-connected from the PMP, to the Project MEL Plan, to the AMELP
- IPs have a critical role in helping the Mission achieve its' project and strategic goals
- USAID wants meaningful indicators that effectively measure the different levels of intended results
- Communication between USAID and IPs is key for success



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Performance Indicator Reference Sheet (PIRS)



What is PIRS?

A Performance Indicator Reference Sheet (PIRS) is a *comprehensive* record of a given performance indicator

- A PIRS details:
 - what an indicator means
 - its source
 - how it is collected
 - who is responsible
 - data quality issues
 - baseline timeframe and target rationale
 - changes to indicator

**PIRS is not a
place to
store data!**

But, you might view or use PIRS differently depending on what your role is, what you want to achieve, or when you are using it.



Why use PIRS?

- **Clarity** in indicator definition, methodology, responsibilities;
- **Consistency** in data collection and use across USAID staff and IPs;
- **Transparency** and **documentation** in decision-making around indicator selection and indicator changes;
- **Collaboration** between USAID and partners to collect the data we want and need; and eventually
- **Higher quality data!**



USAID/Jordan Activity Performance Indicator Reference Sheet (PIRS)

IDENTIFICATION

Linkage to Mission Results Framework:

Name of Activity Result Measured (Goal/IR/sub-IR):

Indicator Name and Number:

Indicator Type: ☐ Activity Custom ☐ Standard F ☐ Mission PMP

Is this a PPR indicator? ☐ No ☐ Yes, for Reporting Year(s)

DESCRIPTION

USAID Definition (for Mission and F indicators):

Precise Definition:

Unit of Measure:

Method of Calculation:

Disaggregation:

Location Reporting Level:
(select only one)

☐ Location or Facility (please attach GPS Coordinates)
☐ District ☐ Governorate

☐ Municipality
☐ Kingdom

Management Utility:

PLAN FOR DATA COLLECTION

Data Collection Method:

Data Source(s):

Timing/Frequency of Data Acquisition:

Individual Responsible at Activity (title):

Location of Data Storage:

PLAN FOR DATA ANALYSIS, REVIEW, & REPORTING

Data Review & Analysis:

Reporting of Data:

DATA QUALITY ISSUES

Date of Past Data Quality Assessment:

Known Data Limitations:

Actions Taken or Planned to Address Data Limitations:

BASELINE & TARGETS

Baseline Timeframe/Notes:

Rationale for Targets/Notes:

CHANGES TO INDICATOR & OTHER NOTES

Changes to Indicator:

Other Notes:

THIS SHEET WAS LAST UPDATED ON: / /

PERFORMANCE DATA TABLE



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**PIRS are fundamental to our
ability to do good performance
monitoring!**



PIRS Sections

1. Identification:

- Name of the indicator
- The result it measures
- F or a PPR indicator, or Mission required?

2. Description:

- Definition/Precise
- Method of calculation
- Unit of measure
- Disaggregation
- Location Reporting Level
- Management utility

USAID/Jordan Activity Performance Indicator Reference	
IDENTIFICATION	
Linkage to Mission Results Framework:	
Name of Activity Result Measured (Goal/IR/sub-IR):	
Indicator Name and Number:	
Indicator Type: <input type="checkbox"/> Activity Custom <input type="checkbox"/> Standard F <input type="checkbox"/> Mission PMP	
Is this a PPR indicator? <input type="checkbox"/> No <input type="checkbox"/> Yes, for Reporting Year(s) _____	
DESCRIPTION	
USAID Definition (for Mission and F indicators):	
Precise Definition:	
Unit of Measure:	
Method of Calculation:	
Disaggregation:	
Location Reporting Level: (select only one)	<input type="checkbox"/> Location or Facility (please attach GPS Co <input type="checkbox"/> District <input type="checkbox"/> Governorate
Management Utility:	49
PLAN FOR DATA COLLECTION	



DISCUSSION

Indicator 1: Number of health providers trained

What information do you need to collect this?

What does “trained” mean?

What does provider mean?

How will this be disaggregated?

What location details would you need (for DevResults)?

Indicator 2: Percentage of students who can read their grade level text

What information do you need to collect this?

Numerator: what would this be?

Denominator: what would this be?

How is “can read” defined?



PIRS Sections

3. Plan For Data Collection:

- Data collection method
- Data source and data collection frequency
- Individual responsible
- Data storage

4. Data Analysis, Review, and Reporting

5. Data Quality Issues

- Known data limitations and significance
- Actions to address the limitation

Indicator Type: <input type="checkbox"/> Activity Custom <input type="checkbox"/> Standard	
Is this a PPR indicator? <input type="checkbox"/> No <input type="checkbox"/> Yes, for F	
USAID Definition (for Mission and F indicators)	
Precise Definition:	
Unit of Measure:	
Method of Calculation:	
Disaggregation:	
Location Reporting Level: (select only one)	<input type="checkbox"/> Location of <input type="checkbox"/> District
Management Utility:	
PLAN FOR	
Data Collection Method:	
Data Source(s):	
Timing/Frequency of Data Acquisition:	
Individual Responsible at Activity (title):	
Location of Data Storage:	
PLAN FOR DATA AN	
Data Review & Analysis:	
Reporting of Data:	
DATA	
Date of Past Data Quality Assessment:	
Known Data Limitations:	
Action Taken to Address Data Li	



Tips and Lessons Learned for Completing a PIRS

- **Indicator Names** - Consider using a naming/numbering convention
- **Indicator** - Make sure that indicators are numbered in PIRS (and elsewhere) to reflect position in RH
- **Definitions** -
 - Each word that might be understood differently by different people should be defined. What do you mean by “effective?”
 - List specific details of what your activity counts under general topics such as the title of trainings that count for “trained”
- **Unit of measure** - Define both numerator and denominator for percentages
- **Method of data collection** - “implementing partner reports” is not a method of data collection



Tips and Lessons Learned for Completing a PIRS

- Make sure that program staff review and understand PIRS for indicators regarding their work
- Consider having a PIRS peer review process to get extra sets of eyes on each PIRS
- Disaggregate clearly and carefully
- Some sections will be the same for all your PIRS, complete them first and then share the template
- Standard Indicators already have PIRSs, HOWEVER, you may need to add specifics
- Ask PRO team/your AOR/COR for the most updated version



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Any questions?

Thank you!

Please help us improve with a short evaluation