**Session 3**

**Performance Monitoring and Evaluation Mission Orders**

**By the end of this session:**

- Become familiar with the standardized mission orders on performance and evaluation

- Understand implications for Mission performance monitoring and other roles

- ## Standardization requested by the field
  (especially July 2012 Program Officers Conference)

- ## Problem:
  - missions develop unique approaches to USAID's basic business processes
  - rotating FSOs recreate approach from last mission
  - FSNs experience constantly changing processes
  - inefficient, less time for substantive work

So, let's standardize core processes, but still allow room for Mission customization!

**The Standardized Mission Orders cover key components of the Program Cycle that should be commonly implemented:**

- Strategy/CDCS

- Project Design

- Budget

- **Performance Monitoring**

- **Evaluation**

- **Portfolio Review**

**Returning to the Standardized Mission Orders, let's focus on the following:**

- Strategy/CDCS

- Project Design

- Budget

- **Performance Monitoring**

- **Evaluation**

- **Portfolio Review**

- Content
  - Planning
  - Data Collection, Oversight, and Quality Assurance
  - Data Analysis, Utilization, and Learning

- Three interconnected levels of monitoring:
  - Mission PMP
  - Project M&E Plan
  - Activity M&E Plan

- Change in one level "ripples" through others

- Performance monitoring roles and responsibilities

- MO emphasizes USE of performance data

- Requires geographic disaggregation of data

- Site visits are included as part of the activity oversight process

- Recommended reviews at activity, project, CDCS levels

# Performance Monitoring: Roles

**COLLABORATE**
internally and with partners and external entities

- **Solicit feedback** in developing performance and context indicators
- **Share PIRS** with partners who are responsible for reporting data to USAID

**UPDATE THE PMP**
regularly since it is a living system

- **Integrate new indicators and evaluations** when project M&E plans are approved
- **Adjust the PMP** as learning occurs, context changes, or new learning gaps are identified
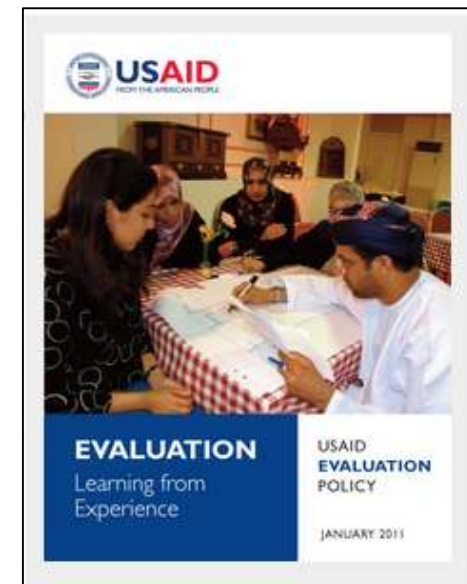
**USE DATA**
for learning and decision-making

- **Analyze performance** against targets across the Results Framework and Project LogFrame
- **Use performance data** from the PMP to prepare for portfolio reviews, adapt and learn

- Operationalizes ADS 203 (informed by the Evaluation Policy)

- Topics Covered: Evaluation Planning, Management and Use

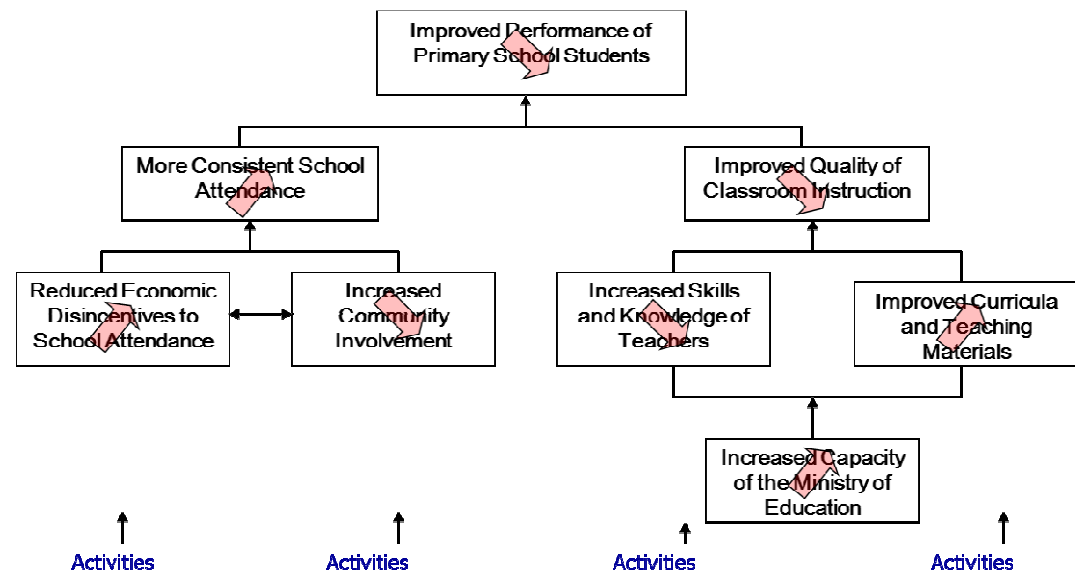- Roles of Program and Technical offices in managing evaluation

- Timing:
  - Strategic Portfolio Review (annually or bi-annually)
  - Other reviews (DO, Project, Activity) discussed in PM MO

- Preparation:
  - Analyze data
  - Learn with partners

- Follow up is **essential**

- Management Action Tracker

- Ask tough questions about strategy achievement, learning, and seeing opportunities

- Interpret and analyze data, rather than simply track data in large spreadsheets

- Employ skills as sector specialist/ development professional

# Exercise

**Jeopardy Game**

**Highlight key elements of the Performance Monitoring, Evaluation and Portfolio Review Mission Orders**

# Working Lunch

Discuss with your colleagues one important take away from the morning sessions as well as one unresolved question. Write it on a piece of paper and the facilitation team will collect them.