



USAID | MEXICO
FROM THE AMERICAN PEOPLE

[ACTIVITY TITLE]: Activity Monitoring, Evaluation, and Learning Plan

[Contract/Agreement] Number: [Insert number]

Activity Start Date and End Date: [e.g. January 1, 2018 to
December 31, 2022]

Total Estimated Cost: [USD]

[COR/AOR] Name: [Insert name]

Submitted by: [Insert name], Chief of Party
[Name of Prime
Implementing Partner]
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Tel: [Insert number including country code]
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DISCLAIMER

This publication was produced at the request of the United States Agency for International Development. It was prepared independently by <list authors and/or organizations involved in the preparation of the report>.

Acronyms

Example:

USAID	United States Agency for International Development
MEL	Monitoring Evaluation and Learning
ADS	Automotive Directive System
PIRS	Performance Indicator Reference Sheet

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1. Introduction

Note: This document serves as guidance for USAID Mexico’s Implementing Partners for the development of their Activity Monitoring, Evaluation and Learning Plan (AMELP). This template includes the minimum required information to design an AMELP, with the standards contained on the [ADS 201.3.4.10](#). Every section of this template must be filled to consider it complete. It is to the discretion of the AOR/COR to add additional requirement to the AMELP if needed. This document must be approved by the COR/AOR.

1.1 Activity Purpose and Description (max ½ page)

Guidance: *The activity purpose should be a clear and concise statement of one or two sentences specifying what USAID and the IP want to achieve with it. The activity description is a brief narrative explaining the structure, stakeholders, timeframe and other characteristics as needed.*

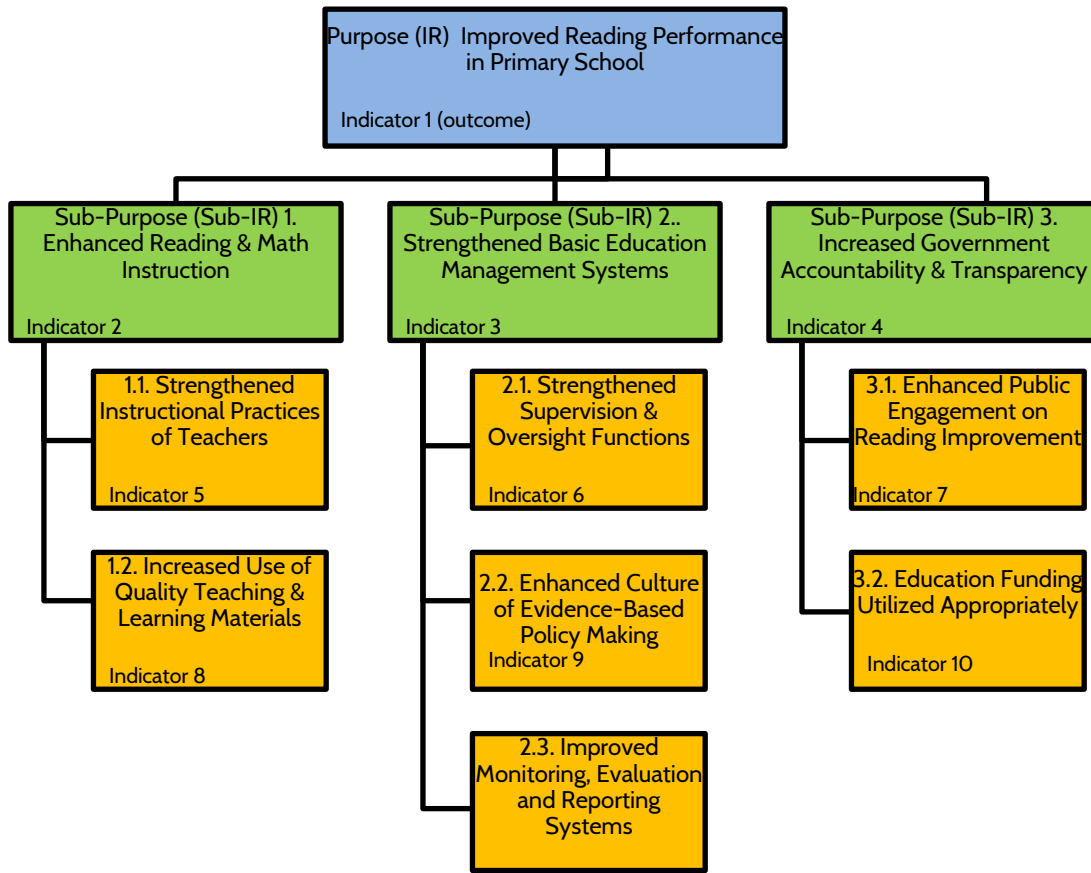
1.2 Purpose of the AMELP (max ½ page)

Guidance: *Suggested standard text: “The purpose of this AMELP is to guide efforts and to provide USAID and the implementing partners with information about how the activity will be making progress toward stated results”.*

2. Activity’s Logic Framework and Theory of Change (max 1 page)

Guidance: *Provide a clear and concise description of the Activity’s logic framework (diagram example provided below) and theory of change, including assumptions and results. Additionally, please describe how this activity contributes to the USAID Mexico Results Framework.*

Diagram 1: Results Framework example



3. Monitoring Plan (max ½ page for description)

Note: Monitoring is the ongoing and systematic tracking of information relevant to USAID strategies, projects, and activities. Information derived from monitoring serves two important functions: a) support adaptive management and b) inform our stakeholders. When high quality monitoring data is available and can be easily used to inform decision making, we are able to successfully adapt. Strong monitoring data also improves USAID accountability to the U.S. Congress and the public

Guidance: Provide a description of the planned monitoring tasks and reports to USAID, frequency, and responsible persons. (max ½ page)

Guidance: Provide an **indicator summary table** that includes the following information. (Required template on [annex 1](#))

- a. Indicator Name and Number (Description if needed)
- b. Reference to the activity Logic Framework
- c. Indicator Type - Performance¹ (Outcome, and Output,) or Context² indicators

¹ Performance indicators measure expected outputs and outcomes of strategies, projects, or activities based on a Mission’s Results Framework or project or activity logic model. Performance indicators help answer the extent to which a Mission or Washington OU is progressing toward its objective(s), but alone cannot tell a Mission or Washington OU why such progress is or is not being made

² Context indicators measure factors outside the control of USAID that have the potential to affect the achievement of expected results. Context indicators may be tracked at any level of a Results Framework or logic model. Context

- d. Baseline³ date and value
- e. Targets (for every Fiscal Year and for the life of activity)
- f. Location: specify if activity is National/Federal or list the State, Municipalities. Latitude/longitude coordinates are also acceptable.
- g. Frequency of reporting
- h. Source
- i. Data Quality Assessment date

4. Evaluation Plan (max ½ page)

Note: Evaluation is the systematic collection and analysis of information about strategies, projects, and activities as a basis for judgements to improve or inform decisions about programming. Evaluation also has a twofold purpose: ensuring accountability to stakeholders and learning to improve development outcomes. Timely and high-quality evaluation supports adaptive management and complements program monitoring

Guidance: If an implementing partner intends to conduct an internal evaluation using its own staff or a contractor, the Activity MEL Plan should include an evaluation plan⁴. This plan should identify all evaluations that the partner will manage over the life of the activity, and should include information on the type of evaluation (performance or impact), purpose and expected use, possible evaluation questions, estimated budget, planned start date, and estimated completion date. The evaluation plan should be clear about the expected level of USAID involvement. The evaluation plan should also include any plans for collaborating with any external evaluations planned by the Mission or Washington OU. It is USAID's responsibility to inform the implementing partner when they will be evaluated externally. This section may explain how the partner will interact with the team to support the evaluation (e.g., providing monitoring data, responding to data collection efforts, or validating findings) and how evaluation findings will be used for management decisions

5. Learning Plan (max ½ page)

Guidance: The learning plan may indicate how the activity will address learning questions or knowledge gaps and identify ways to allow for adjustments as circumstances change or learning evolves. Learning opportunities may take the form of after-action reviews or be incorporated into existing processes, such as work planning or quarterly reporting. Such reviews or reports may focus on challenges and successes in implementation, changes in the operating environment or context that could affect the activity, opportunities to collaborate, or other relevant topics. The learning plan

indicators may be used to track country/regional context; programmatic assumptions of strategies, projects and activities; and operational context.

³ The indicator baseline is the value of an indicator before major implementation actions of USAID-supported strategies, projects, or activities. Baseline data enable the tracking of changes that occurred during the project or the activity with the resources allocated to that project or activity. All performance indicators are required to have baseline data. Baseline data should be collected before implementation of an intervention. If baseline data cannot be collected until later in the course of a strategy, project, or activity, the indicator's PIRS should document when and how the baseline data will be collected. ([ADS 201.3.5.7. E](#))

⁴ Per USAID terminology, an external evaluation is commissioned by USAID and must be managed by the Mission Program Office, while an internal evaluation is one commissioned and managed by an implementing partner.

should detail the frequency with which learning and reflection occur and who will be involved, in alignment with the activity work plan.

6. MEL Reporting (max ½ page)

Guidance: The following is a standard paragraph. Please update the name of the MEL point of contact who will confirm if the following statement is accurate.

As required by the award document, the following reports will be submitted to USAID Mexico to provide information regarding Monitoring Evaluation and Learning

- a. Annual Work plans. The Recipient will develop an Annual Work Plan in English for every year of the award period. The 12-Month Work Plan will be finalized in consultation with the USAID/Mexico Agreement Officer's Representative (AOR) within 30 days of the start of each activity year (the activity year starts on October 1st). The first year's Annual Work Plan will be reviewed and approved by the AOR and must be submitted to the AOR in English no later than 30 days after the start of the award. The Annual Work Plan will contain clear performance indicators and benchmarks against which the recipient will report quarterly.
- b. MEL Plan. The Recipient will develop a Monitoring and Evaluation Plan in consultation with the USAID/Mexico AOR. The M&E Plan must be submitted in English to the AOR for approval within 30 days of the start date of the award with baselines and targets to be finalized at a later date agreed to by the AOR. The M&E Plan shall include gender disaggregated data as appropriate
- c. Quarterly Reports. The Recipient must prepare and submit Quarterly Progress Reports in English to the AOR for approval and they must be submitted no later than 30 days after the end of each reporting period (except the last quarter of the year, whereby the 4th Quarterly Progress Report will be replaced by an Annual Progress Report.

The MEL point of contact is <Name of the Implementing Partner's MEL point of contact>. S/he will be responsible for providing any MEL related detail if needed.

7. Performance Indicator Reference Sheets

Guidance: The Performance Indicator Reference Sheet (PIRS) is a tool USAID uses to define performance indicators; it is key to ensuring indicator data quality and consistency. A PIRS is required for each performance indicator and must be completed within three months of the start of indicator data collection. When possible, a PIRS should be completed prior to data collection to ensure the indicator and its data collection methodology are clearly defined. Consult the guidance and template on annex 2.

8. Annexes

Tab 1. [Indicator Summary Table](#) (Required)

Tab 2. PIRS [Guidance](#) and [Template](#)