# American Red Cross International Services Monitoring, Evaluation, and Learning (MEL) Template

This document covers a comprehensive MERL plan for a new project. A basic and budgeted plan should be submitted with the project proposal and a comprehensive plan should be submitted at 3 months following project start up. The template should be “right-sized” to be adapted to the needs of the project context. Many of the elements required in this template are also required by OFDA and BHA and can be used for donor purposes as well.

Projects are also expected to include standards and practices supporting protection, gender and inclusion (specifically assessment) and community engagement and accountability in program design. However, the description of these activities is likely to be in the main narrative of the proposal rather than the MERL plan.

## Theory of Change

This document uses a typical MERL concept called Theory of Change (TOC) as the foundation for MERL. The TOC describes the logic of how day-to-day operations and strategic investments ultimately contribute to a desired impact.

In programs that have a fully developed ToC diagram should include it as an annex. Programs in ISD are not required to develop a full ToC. However, a program should be able to at minimum provide a simple statement of the main objectives and high-level activities of the project also knows as an “if-then statement” (if the project does x, then y happens), an explanation of the causal pathways and the assumptions. List out several assumptions.

ISD projects should also relate to their respective pillar Theory of Change. Please briefly describe the linkage between the project and the pillar level ToC.

## Learning Questions

Questions at each level of the TOC are meant to test and challenge hypotheses, inform program adaptation, and frame a learning agenda for learning questions. Look at the assumptions in the Theory of Change for direction on learning questions and identify several learning activities that may be planned to address the learning question. Please estimate the budget either in financial resources or in LOE of the learning activities. This does not have to be precise but an estimate of how and when staff will engage.

|  |  |  |  |
| --- | --- | --- | --- |
| Learning Question | Learning Activity | Financial Budget (if any) | Staff Time estimates |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Performance Monitoring

The performance monitoring section of the MERL Plan includes three components: the logical framework, the key performance indicators and setting targets. While the same KPIs will appear in each tool, they each have a different purpose. The logical framework is a broader management tool built from the ToC, the KPI matrix specifically defines indicators that describe what success looks like for the project. The third tool helps set targets.

## Logical Framework

The logical framework template is not standardized. The [DMERL Framework SharePoint site offers the IFRC standard log frame template](https://americanredcross.sharepoint.com/:w:/r/sites/ISD/PPS/IMMEL/_layouts/15/Doc.aspx?sourcedoc=%7BF9B16F82-D45A-4EE9-AFE1-98B46FBDA305%7D&file=IFRC-Logframe-template-definitions-examples-3-2011.doc&action=default&mobileredirect=true). Ideally, a logframe includes the long term, medium term and near-term outcomes of a program, as well as the associated risks and assumptions to achieving them. The logical framework must be completed at the time of project design. Please include as an annex.

## Key Performance Indicator Matrix

Key performance indicators should track near-term and medium-term outcomes of the logframe, as well as the learning questions (specifically those built upon the assumptions and risks in the ToC). KPIs may also track outputs identified in the log frame. However, only those outputs that provide meaningful data to help managers understand the performance of the project should be tracked.

Definitions for each indicator, as well as methodology, data source, frequency of collection and unit / person responsible should be included. KPIs should include indicators that can be monitored throughout the program as well as those that can be included at baseline and endline, if appropriate.

Data collection methods will be designed so that data can be collected as easily, appropriately and as often as practical or as indicated, so as to reveal significant change in results or, at the very least, trends. As always, this is balanced against the available resources for MERL. The top priorities will always be to demonstrate return on investment and outcomes.

ISD standard indicators and donor standard indicators should be incorporated into the KPI matrix at the design of the project. The key performance indicator can be fully developed during project start up prior to baseline.

**Key Performance Indicator Matrix**

| **Indicator** | **Indicator Definition** | **Data Source** | **Data Collection Methodology** | **When** | **By whom** |
| --- | --- | --- | --- | --- | --- |
|  | | | | | |
|  |  |  |  |  |  |
|  | | | | | |
|  | | | | | |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  | | | | | |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Key Performance Indicator Targets

Set targets for your key performance indicators. Most indicators will be reported cumulatively, unless otherwise indicated. Baselines for indicators will be determined as the first major exercise in this MERL plan. Baseline data may be collected through a population-based study or through data collection targeting specific groups and activities, depending on the indicator. Baseline and annual or monthly targets do not have to be set until three months after project start up. Estimated Life of Project targets should be set at project design stage. These can be updated during the three-month project start-up phase.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Key performance indicators** | **Baseline** | **Life of Project Targets** | **year** | **year** | **year** | **year** | **year** | **Total** |
| Use your logic framework above to group KPIs by objective |  |  |  |  |  |  |  |  |

## Baseline, Endline, and Evaluation Plans

Please describe how the program’s indicators will be baselined, when that baseline will occur, if applicable (some program’s may use the endline of a previous program to baseline), and the resources required to perform the baseline. Please also note that a population-based study is not always necessary as a baseline. Next, please describe any plans for evaluative actions for this project including plans for program reviews, after action reviews, mid term evaluations, endlines, final evaluations or research. Please indicate roughly how much budget has been allocated for these activities at the time of project submission.

|  |  |
| --- | --- |
| Evaluative Action | Project Budget |
|  |  |
|  |  |
|  |  |

For projects with a planned evaluation: For projects with a planned evaluation, take this opportunity to identify high level evaluation questions. You may adapt and expand on questions at the time of the evaluation.

|  |  |
| --- | --- |
| Theory of Change Objective/Causal Pathway | Evaluation Question |
|  |  |
|  |  |
|  |  |
|  |  |

## MEL Activity Plan

The MERL Plan should also lay out MERL-related activities by year and quarter. This section is not necessary at the time of proposal submission. A detailed work plan will be due at 3 months following project start up.

| **MEL activities** | **Year** | | | | **Year** | | | | **Year** | | | | **Year** | | | | **Year** | | | | **Year** | | | | **Year** | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 |
| Sign off on MERL plan |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Formal launch of MERL plan and activities |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Review of learning priorities and KPIs |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Prepare detailed multi-year MERL work plan |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Prepare detailed multi-year MERL budget |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Review annual MERL work plans and budget |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Baseline all performance monitoring indicators |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Baseline performance evaluation indicators |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Prepare performance monitoring guidelines |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Design performance evaluation |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Execute performance evaluation |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

## MEL Resource Plan

The MEL Resource plan should be included at the time of the proposal submission because these resources should be included in the project budget. Please include key MERL activities include those listed above: learning activities, CEA activities, baseline, endline and evaluation. Please also include a list of staff who will be contributing to MERL activities and the estimated percentage of their time dedicated to the project’s MERL activities.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **MEL activity (# people involved)** | **# People involved** | **Estimated $ budget** | **Estimated level of effort**  **(person days)** | | | | |
|  | **Year** | **Year** | **Year** | **Year** | **Year** |
| Formal launch of MERL plan |  |  |  |  |  |  |  |
| Recruit MERL resources |  |  |  |  |  |  |  |
| Review of learning priorities and KPIs |  |  |  |  |  |  |  |
| Prepare detailed multi-year MERL work plan |  |  |  |  |  |  |  |
| Prepare detailed multi-year MERL budget |  |  |  |  |  |  |  |
| ***TOTALS*** | |  |  |  |  |  |  |

|  |  |
| --- | --- |
| **Staff List** | |
| **Title** | **Percentage FTE** |
|  |  |
|  |  |