

# **USDA Poultry Projects M&E Activity**

## **M&E Working Group Meeting**

### **Discussion Topic One, Section III**

#### **Revising or Updating M&E Plans**

**METSS II Conference Room, Accra**

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**NANA ADWOA KONADU**

# Useful Tips in Revising, Updating and Modifying Approved M&E Plans

Implemented through:



**KANSAS STATE**  
**UNIVERSITY**  
Department of Agricultural Economics



# Stages Plans are Developed, Updated or Modified

- There are three major occasions during which M&E plans are developed, modified, or updated:
  - Proposal design stage and after project award (Phase I)
  - During project implementation (phase II)
  - Following project (portfolio) reviews and other learnings, or management “triggers” (phase III)



# M&E Plans at Proposal Stages

- ❑ M&E Plans are developed when Organizations are responding to call for proposals – Project design stage
  - Focus on indicators at the highest level of the Results Framework - Goal, Objectives, and Intermediate Results (IRs).
  - Suggest indicators at the sub-RI level, where applicable
  - Provide base data using the most reliable and valid data sources possible
  - Add targets that are ambitious, yet realistic and achievable

# M&E Plans after Project Award

- ❑ Projects should draft the M&E Plan within 3 months of project award.
  - The M&E Plan should focus on indicators on all levels of the results hierarchy - Goal, Objectives, Intermediate Results (IRs) & Sub-IRs.
  - Adapt standard indicators for the goal and IR levels.
  - Custom indicators are important, but keep them simple
  - Avoid including process indicators in your M&E Plans; they could be contained in SOPs to guide field implementation



# Revising and Updating the Plan

- M&E Plans are living documents and therefore are expected to be revised and or updated periodically
  
- Revisions and updates are triggered by the following:
  - During activity design and implementation stage
  - Gaps in the logic of the results framework
  - Need to revise the results framework
  - Annual update of indicator results



# Revising and Updating the Plan Contd.

- ❑ M&E Plans are also revised following project (portfolio) reviews
  - Project (portfolio) reviews provide an opportunity for the project to assess and better understand its progress towards the desired results outlined in its project Results Framework.
  - The portfolio review provides a chance for reflection, asking questions, and identifying areas in which more evidence is needed



# Revising and Updating the Plan Contd.

- ❑ Topics/areas to guide your review process
  - Status of critical assumptions and the hypothesis defined in the RF, along with the related implications for performance;
  - Country and regional trends and how the context is evolving
  - Evidence that projects are leading to the achievement of the project goal;
  - What has been learned during project implementation from monitoring data, evaluation findings, partners feedback, or other sources of evidence
  - Budget cuts, an unexpected political change in the host country government



# Revising and Updating the Plan Contd.

- How to revise, Update or Modify your M&E Plan (System)
  - Request for a meeting to present your learnings
  - Ask your donor for the guidelines in submitting a request for revising your M&E Plan
  - Prepare the request and submit it on time and to specification
  - Make the necessary follow ups to obtain either a partial approval, or full approval
  - Clearly document the change process

# Revising and Updating the Plan Contd.

## Caution

- Significant changes to the project results statements and indicators may jeopardize the comparability of data over the course of the strategy.
- Proposed changes should, therefore, not cause a disruption in how the project would be perceived and assessed in future

# Documenting Changes to the M&E Plan.

**PMP Change Tracker Table Template**

Item	Source Document/Date and/or Version	Description as Listed Previously	Status (Revise, Add, Drop)	Revision and Date	Comments

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### Example PMP Change Tracker Table

Item	Source Document/Date and/or Version	Description as Listed Previously	Status (Revise, Add, Drop)	Revision and date	Comments
Sub-IR (and Project Purpose)	Approved R/CDCS, dated 12/5/2012	"Civil Society Organizations capacity to provide constituent services improved"	Revise	"Civil Society Organizations capacity to provide constituent services in targeted rural areas improved" (approved by Project Manager and DO Team Leader on 3/12/2013 (PMPOC informed))	During Project Design the team realized that the program could not be focused across the country to include all civil society organizations nationally. Instead, the priority is to provide services to rural communities in targeted areas, where government capacity to deliver services is too low. While the scope has changed, the meaning of the result has not changed. This change does not require Washington approval, because it is at the sub-IR level (see <i>Mission Order on Strategy</i> ). The change also has the full agreement of the Ministry of Local Development.

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# Thank You.

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