Monitoring and Evaluation Plan Module

This module will help the user understand what a Monitoring and Evaluation Plan is, how it can best be used and also provide a guide for how to write one.
THIS MODULE INCLUDES:

Contents
(Direct links clickable below)

- Pre-test your knowledge
- What is a Monitoring and Evaluation Plan?
- What are M and E Plans used for?
- Why should we write an M and E Plan?
- Who should an M and E Plan be used for?
- Who should be involved?
- How to write an M and E Plan

Interactive Pages
(i.e. Worksheets) will help you...

- Additional Resources

TOOLS IN THIS MODULE

(You can click on the underlined tool to go directly to the location of the tool in this module.)

Tool 1: M&E Plan Checklist
Tool 2: Sample Information Maps
Tool 3: M&E Matrix Templates
Tool 4: Information Map Template
Tool 5: USAID Indicator Reference Sheet Template
Tool 6: Results Framework Sample
Pre-Test-Check Your Knowledge

True or False Questions:
Please answer the following True or False questions. Read each statement below. If you agree with a statement, write A = YES. If you disagree with a statement, write B = NO. Also, explain why you believe that statement is wrong.

__________ 1. A M&E Plan is an optional step in the DM&E process.

__________ 2. A M&E Plan should be developed before monitoring and evaluation of a project begins.

__________ 3. Strategic Partners should be included in the development of a M&E Plan.

__________ 4. It is important for a M&E plan to include all M&E activities.

__________ 5. A M&E Plan cannot be altered throughout the course of the project.

Answers: 1 B; 2 A; 3 A; 4 A; 5 B
If you answered 3 or more incorrect, you must complete this module!

What is a Monitoring and Evaluation Plan?
The Monitoring and Evaluation plan (M&E plan) is a document used by the project team to help plan and manage all Monitoring and Evaluation activities throughout a particular project cycle. It also should be shared and utilized between all stakeholders and sent to donors. It keeps track of what you should monitor, when you should monitor, who should monitor, and why you should monitor.

Think about the M&E Plan as a Work Plan specific to Monitoring and Evaluation activities. Generally, the M&E Plan includes:

- Goals and objectives of overall plan
- M&E questions and methodologies
- Implementation plan
- Matrix of M&E indicators and expected results
- Proposed timetable of all M&E activities
- M&E instruments for gathering data

The M&E plan should have a rigid flexibility; rigid enough that it is well thought out and planned but also flexible to account for changes that can improve or identify better monitoring and evaluation practices. This is especially important in the ever-changing and fast-moving conflict environment.

**Tip:** An activity in the context of this module is any specific action, function, or work that deals with monitoring & evaluation. For example, a monitoring activity is a conducting a pre-post test for a training or workshop. An example of an evaluation activity is writing a mid-term evaluation.
What are M and E Plans used for?

The M&E plan allows all staff involved with the project to have a reference sheet of all the monitoring and evaluation activities during the progress of the project and highlights data. It helps to identify “who is supposed to do what to collect which data and when it is collected” and how that data has changed over the course of a certain period. The DM&E coordinator and project team can use the M&E plan to contribute to evaluation design and monitoring implementation.

Why should we write an M and E Plan?

In short, the M&E Plan is used for the purposes of management and good practice. It is a critical tool for planning, managing and documenting data collection. The M&E Plan keeps track of the progress we are making, monitors the indicators being used as well as their results. In this way it contributes to the effectiveness of the monitoring and evaluation system by assuring that data will be collected and on schedule. Additionally, it works to build ownership and of the M&E system by the project team, creating additional responsibility and accountability for the success of the M&E activities.

When should the M and E Plan be used?

The M&E Plan should be used as a reference throughout the length of the program cycle, tracking all programs and updated to include all monitoring and evaluation data and results. It should be constantly updated to include up-to-date information of monitoring and evaluation progress. This includes indicator results after each activity or intervention, data collection methods and sources, and who will be collecting data. If they occur, It should also be used and to track changes and updates to monitoring and evaluation activities.

When should it be written?

The M&E plan should be completed one month after the project contract has been signed. This is a USAID requirement.

Who should be involved?

The M&E plan is intended for the use of the organization. Therefore, the M&E plan should be designed by those who are involved in the program, including strategic partners. This allows the creators of the M&E plan to also be the users. This participatory approach ensures project team support and learning, which can increase effectiveness of the M&E and organizational capacity. However, the exact roles that the
DME coordinator, program manager, and project team can vary by program, context, and personnel. At the very least, the Project manager, DME Coordinator, researcher or field staff, and relevant stakeholders should all agree on the goal and objectives for the project. The DME Specialist in the DC office can be used as a resource or facilitator for the initial discussions and review of the goal and chosen objectives.

**Tip:** SFCG often works with its local strategic partners to implement projects. To create ownership, SFCG also strives to include the ideas of strategic partners in all of their projects. Therefore, when at all possible, strategic partners should be consulted when designing the M&E Plan.

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### How to write an M and E Plan?

**What should be included?**

This section of the module will walk through the creation of an M&E Plan. There is no standardized template or structure to an M&E Plan, so therefore the plan can be modified to best fit the programme, communication, and organisational needs. However, an effective M&E Plan should include:

1. Executive Summary
2. Project Background
3. M & E Planning
4. Monitoring and Evaluation System
5. Project Risk Matrix
6. M & E Information Map
7. M & E Work Plan Matrix
8. M & E Timetable
9. References
10. Annexes

(You can click on the underlined step to go directly to the location of the step in this module.)

The length of an M&E plan depends on the complexity of the M&E system, the size of the project, and specific donor criteria. **While there is no specific format for an M&E Plan, there are specific criteria that should be included in the M&E Plan.** These criteria will be explained throughout the module, and a full list of criteria can be found at the end of the module. This module explains the suggestions made by USAID and the European Union. However, since the European Union does not require an M&E plan in
all project (only those with a budget above $300,000), it focuses mainly on the requirements of USAID.

**Documents to have on hand:**
A few documents can act as references to aid in writing the M&E plan:
- Project Proposal
- Logical Framework
- Results Framework (For USAID projects)
- Checklist for M&E Plan ([Click here to jump to checklist](#))

These documents have much of the information that goes into an M&E plan. Using these documents not only provides an easy reference, but also ensures continuity between all project documents. However, the information from these documents should not make up the complete M&E Plan, especially if they are below standards. The M&E Plan should always include more specific information than what is included in these documents, and if needed, revised goals and objectives.

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**Tip:** When making an M&E plan, carefully consider **resource and budget limitations.** Data Collection costs, in terms of human and financial costs, is an important consideration. Do you have the time and resources available to cover all the M&E activities? An M&E plan should be developed with these restraints in mind. Think about the budget in terms of the value of the data collection in relation to the actual cost of data collection.

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**Step One: Executive Summary:**
This section of the M&E Plan should be quite short – Just a quick synopsis of what the M&E plan contains and what it is about.

**Step Two: Project Background:**
This section provides context to the M&E Plan. It should begin by explaining the project:
- Name
- Funding agency
- Date preliminary work (needs assessment and project design) began
- Implementation start date and project termination date
- Main **goal** and **specific objectives** of the project
- Principal strategies
- Target population and groups
- Final number of beneficiaries
- If possible, map of region with project areas located on it

**Step Three: M&E Planning:**
This section explains how and who planned the Monitoring & Evaluation system. It should answer two questions: What were the key issues/decisions? Who participated in the decision making? Key information to include in this section is:
• Date of M&E plan preparation
• Period of time in which the M&E plan proposes activities
• Who made decisions and how were decisions made regarding M&E plan
• Who should collect what information and at which time it is collected

The roles of who is collecting information and at which time it is collected depends on the project team and what best suit the project. There are no prescribed roles in which a person or team is responsible for across all projects. For example, the DM&E Coordinator is not always responsible for data collection. With that said, the roles and responsibilities of each person involved in the project should be clearly defined with specific tasks and the time in which those tasks should be performed.

**Step Four: Monitoring and Evaluation System:**

This section should include a description of all the Monitoring and Evaluation activities of a project, summarizing each individual activity. This includes describing each monitoring and evaluation technique used what it is going to be used for, who is collecting that data, and how the data will be used. It should also include key indicators for each M&E activity.

**Step Five: Project Risk:**

SFCG is committed to the principles of ‘do no harm’ and as such is always careful to consult with local partners to develop potential risks associated with an intervention. Therefore, this section should highlight potential areas of risk while also providing contingency plans if risks do occur. It should also include potential ways to mitigate these risks. Risks can include:

• Changing security conditions
• Miscommunication issues
• Misperceptions of project
• Legal and governmental barriers
• Financial mismanagement

**Step Six: M&E Information Map:**

The M&E Information map is utilized as a visual tool for knowledge management. M&E information maps can take on many different shapes, but all should include:

• Proposal documents (Budget, LogFrame)
• Project documents (Work Plan, M&E Plan, Baseline)
• M&E data collection sources (Reports, Surveys, Meetings)
• M&E reports (Annual Report, Mid-term Evaluation, Final Evaluation)
• M&E stakeholders (SFCG Staff, Beneficiaries, Donors)

The purpose of an M&E information map is to ensure that the proper documents and information is disseminated and correctly used throughout the project cycle. In short, it’s a visual representation of the gathering, processing, and feedback of data within the project. This step is extremely important in making sure that monitoring and evaluation activities inform future decision making and feedback to the project.
Click to see an M&E Information Map example (tool #2)

**Step Seven: M&E Work Plan Matrix:**

The M&E Matrix summarizes a Monitoring and Evaluation Plan by including a list of methods to be used in collecting the data. The matrix provides a visual format for presenting the indicators and their corresponding activities for each project objective. Again, there is no specific template. As a result, the M&E Matrices tend to include a wide range of information. What information is or is not included is determined by either (1) what is deemed most important to the team that is utilizing the M&E plan or (2) donor suggestions/requirements. The most common information included is:

- Indicator and definition
- Who is responsible for data collection?
- How is data collected?
- Where is data collected?
- When is data collected?
- Targets
- Disaggregation

But some matrices also include:

- Responsible partner
- Baseline/Benchmarks
- Why is data collected?

**M&E Matrix – USAID Format**

1. Indicators and their definitions
2. Data source
3. Frequency of data collection
4. Responsibilities for acquiring data
5. Target

Click here to see a USAID template (Tool #3)

**M&E Matrix – EU Format**

1. Results description and indicator
2. Source of information
3. Methods of data gathering
4. Who to collect, analyze data
5. Frequency of reporting

Click here to see a EU Template (Tool #3)

**Terminology:**
Sometimes the terminology can become overwhelming and tricky, especially when writing for different donors. While donors often use different terms, the underlying meanings remain the same. Here is a table translating the different terms used by USAID and EU:

<table>
<thead>
<tr>
<th>USAID</th>
<th>EU</th>
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<tbody>
<tr>
<td><strong>Indicator</strong></td>
<td>Indicator</td>
</tr>
<tr>
<td><strong>Wider or Long Term Effect</strong></td>
<td>Goal</td>
</tr>
<tr>
<td><strong>End of Project Effect</strong></td>
<td>Strategic Objective</td>
</tr>
<tr>
<td><strong>Intermediate Effect</strong></td>
<td>Intermediate Results</td>
</tr>
<tr>
<td><strong>WHERE is Data Collected?</strong></td>
<td>Data Source</td>
</tr>
<tr>
<td><strong>HOW is Data Collected?</strong></td>
<td>Method of Data Collection</td>
</tr>
<tr>
<td><strong>WHEN and HOW OFTEN is Data Collected?</strong></td>
<td>Frequency of Data Collection</td>
</tr>
<tr>
<td><strong>WHO is Collecting Data?</strong></td>
<td>Responsibilities for Data Collection</td>
</tr>
</tbody>
</table>
| **Target**                   | no specified term       

This section should also include a short paragraph stating:
- Who prepared the M&E Matrix (and who assisted)
- Formatting of matrix
- Changes from LogFrame or Project Document (If necessary)

**Step Eight: M&E Timetable**

The M&E Timetable is fairly straightforward. It provides an answer to the question “When are each of the monitoring and evaluation activities being implemented?”

Click here to see a template of a M&E Timetable (Tool #4)

**Tip: Integrate M&E Plan into Work Plan** When possible, the M&E Plan should be integrated into the Work Plan. For example, the M&E Plan timeline can be integrated into the work plan timeline. This allows for all those involved on the project to be aware of the M&E activities.

**Step Nine: References:**
A list of documents referred to within the M&E Plan.

**Step Ten: Annexes:**
With each M&E Plan, a number of annexes should be included. Potential annexes are:
- Indicator Reference Sheet  (USAID Requirement)
- Results Framework
- Budget
**Indicator Reference Sheet**

USAID requires an Indicator Reference Sheet to be filled out for each Indicator; otherwise they generally are not used. An Indicator reference sheet gives a full description of each indicator. The reference sheet can be used as a quick but complete overview of each indicator, including its full description, where the data comes from, and how it can be analyzed.

**Click here for an Indicator Reference Sheet Template (tool #5)**

**Results Framework**

A Results Framework (RF) is a graphic that provides a strategy to obtain a strategic objective that is developed through cause-effect logic. A Results Framework has four key parts:

- Strategic Objective
- Intermediate Results
- Hypothesized Cause-Effect Linkages
- Critical Assumptions

An RF is generally developed before an M&E Plan, as it is a required part of the project proposal documents. The RF provides a great resource to use while creating the M&E Plan to ensure the plan aligns with the larger objectives and goals of the project. That being said, if there is new information and analysis, the RF may and should be updated at this point in the project cycle.

**TIP:** Although not a requirement for a USAID M&E Plan, an RF is required for all project proposals for USAID.

**Click here for a Results Framework Example (Tool #6)**

**USAID Requirements**

USAID has a set of requirements for an M&E Plan. These revolve around indicators, key benchmarks (or baseline values) and targets. Therefore, sections of an M&E Plan that MUST be included when USAID is the donor are:

- Indicator Reference Sheet
- M&E Timetable
- M&E Matrix
- M&E System
- Budget Annex

The table below shows each USAID requirement in an M&E Plan and where the information should be found in the M&E Plan.

<table>
<thead>
<tr>
<th>USAID Requirement</th>
<th>Corresponding Location in M&amp;E Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>State the full set of performance</td>
<td>Indicator Reference Sheet</td>
</tr>
</tbody>
</table>
The M&E Matrix technically has no requirements or specific template. However, this information is often included on the M&E Matrix. A project team can use their discretion on which information to include or not include based on what is important for them or donor suggestions and terminology.

### Checklist for M&E Plan

Use the following checklist to ensure that all major components of the M&E Plan are covered:

- **Executive Summary**
- **Project Background**
  - Name
  - Funding agency
  - Date preliminary work (needs assessment and project design) began
  - Implementation start date and project termination date
  - Main goal and specific objectives of the project
  - Principal Strategies

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(ADS 203 Pg. 23)

*The M&E Matrix technically has no requirements or specific template. However, this information is often included on the M&E Matrix. A project team can use their discretion on which information to include or not include based on what is important for them or donor suggestions and terminology.*

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**TOOL 1 Checklist for M and E**

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**Checklist for M&E Plan**

Use the following checklist to ensure that all major components of the M&E Plan are covered:
- Target population and groups
- Final number of beneficiaries
- If possible, map of region with project areas located on it

- **M & E Planning**
  - Date of M&E Plan preparation
  - Period of time in which the M&E plan proposes activities
  - Who made decisions and how were decisions made regarding M&E plan

- **Monitoring and Evaluation System**
  - Description of all activities in M&E System
  - Overview of key indicators

- **Project Risk Matrix**
  - Analysis of potential risks
  - Contingency plans for each risk

- **M & E Information Map**
  - Proposal documents (Budget, LogFrame)
  - Project documents (Work Plan, M&E Plan, Baseline)
  - M&E data collection sources (Reports, Surveys, Meetings)
  - M&E reports (Annual Report, Mid-term Evaluation, Final Evaluation)
  - M&E stakeholders (SFCG Staff, Beneficiaries, Donors)

- **M & E Work Plan Matrix**
  - Indicator and definition
  - Who is responsible for data collection?
  - How is data collected?
  - Where is data collected?
  - When is data collected?
  - Disaggregation
  - Targets

- **M & E Timetable**
  - Each M&E Activity is accounted for

- **References**

- **Annexes**
  - Indicator Reference Sheet*
  - Results Framework*
  - Budget

*USAID requirement
### M&E Plan Matrix template: USAID Format

<table>
<thead>
<tr>
<th>RESULT</th>
<th>INDICATOR</th>
<th>INDICATOR DEFINITION</th>
<th>DATA SOURCE</th>
<th>FREQUENCY OF DATA COLLECTION</th>
<th>TARGET</th>
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<td>Specific objectives:</td>
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<td>Expected outcomes</td>
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<td>Activities / Outputs</td>
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### M&E Plan Matrix template: EU format
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<th>Ref No</th>
<th>Result Description and Indicator</th>
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**Goal:**

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Back to “Step Seven: M&E Work Plan Matrix”

**TOOL 4 – Timetable Template**
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<td>EVALUATION</td>
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Back to “Step Eight: M&E Timetable”
# USAID Indicator Reference Sheet Template

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<th>Indicator .....</th>
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</thead>
<tbody>
<tr>
<td>Name of Programme Objective ......:</td>
</tr>
<tr>
<td>Name of Programme Area ......:</td>
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<tr>
<td>Name of Programme Element......:</td>
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<tr>
<td>Name of Indicator (1.1):</td>
</tr>
<tr>
<td>Is this an F-Indicator? No _ Yes _</td>
</tr>
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## DESCRIPTION

<table>
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<tr>
<th>Precise Definition(s):</th>
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<tr>
<td>.</td>
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<tr>
<td>Unit of Measure:</td>
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<td>Disaggregated by:</td>
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<td>Justification &amp; Management Utility:</td>
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## PLAN FOR DATA ACQUISITION BY USAID

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<tr>
<th>Data Collection Method:</th>
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<tr>
<td>Data Source:</td>
</tr>
<tr>
<td>Method of Data Acquisition by USAID:</td>
</tr>
<tr>
<td>Frequency and Timing of Data Acquisition:</td>
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<tr>
<td>Individual Responsible:</td>
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<tr>
<td>Individual Responsible for Providing Data to USAID:</td>
</tr>
<tr>
<td>Location of Data Storage:</td>
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</table>

## OTHER NOTES

<table>
<thead>
<tr>
<th>Notes on Baselines/Targets:</th>
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<td>Other Notes:</td>
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THIS SHEET LAST UPDATED ON: 

Back to “Step Ten: Annexes”
The Illustrative Results Framework links to the FAF Program Hierarchy as follows:

- **Objective 4 Economic Growth**
  - Program Areas: 4.6 (Private Sector Competitiveness) and 4.7 (Economic Opportunity)
  - Program Elements: 4.6.1, 4.6.2, 4.7
  - Sub-Elements: 4.6.12 and 4.7.2.1
  - Sub-Element 4.6.13
  - Sub-Element 4.7.2.2
  - Sub-Element 4.6.2.1
  - Sub-Element 4.7.3
  - Sub-Element 4.6.2.4

**Assistance Objective:** Economic Competitiveness of Private Enterprises Improved

**IR 1:** Enabling Environment for Enterprises Improved

- **IR 1.1** Licensing and registration requirements for enterprises streamlined
- **IR 1.2** Commercial laws that support market-oriented transactions promoted
- **IR 1.3** Regulatory environment for micro and small enterprises improved

**IR 2:** Private Sector Capacity Strengthened

- **IR 2.1** Competitiveness of targeted enterprises improved
- **IR 2.2** Productivity of micro-enterprises in targeted geographic regions increased
- **IR 2.3** Information Exchange Improved

**Critical Assumptions:**

- Key political leaders, including the President and the Minister of Trade and Labor, will continue to support policy reforms that advance private enterprise-led growth.
- Government will sign the Libonia Free Trade Agreement, which will open up opportunities for enterprises targeted under IR 2.1.
The following resources are particularly good for the development of a monitoring and evaluation plan:

**M&E Plan Samples, Templates, and Resources**

**M&E Plan Template by Creative Research and Evaluation Centre (Uganda)**

**USAID Performance Monitoring and Evaluation Plan Tips**

**EU Project Management and Quality Plan Checklist**

**USAID Assessing and Learning Document**
Following are various models that complement the ABCDE and SMART models in developing specific and measurable goals and objectives:

**SPICED**

**Subjective:** using informants for their insights

**Participatory:** involving a project's ultimate beneficiaries, involving local staff and other stakeholders

**Interpreted and communicable:** explaining locally defined indicators to other stakeholders

**Cross-checked and compared:** comparing different indicators and progress, and using different informants, methods, and researchers

**Empowering:** allowing groups and individuals to reflect critically on their changing situation

**Diverse and disaggregated:** seeking out different indicators from a range of groups, especially both genders, multi-generational groups, to assess their differences over time

**CREAM** (Schiavo-Campo, “Performance in the Public Sector,” p. 85, 1999)

**Clear:** precise and unambiguous

**Relevant:** appropriate to the subject at hand

**Economic:** available at reasonable cost

**Adequate:** able to provide sufficient basis to assess performance

**Monitorable:** amenable to independent validation