

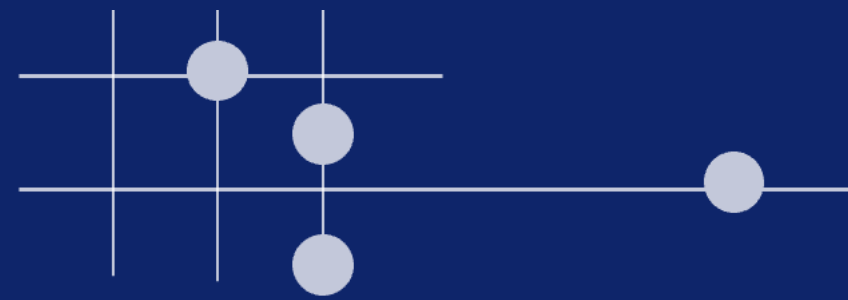
TB DIAH

TUBERCULOSIS DATA, IMPACT ASSESSMENT
AND COMMUNICATIONS HUB

**Introducing the New USAID Monitoring, Evaluation, and Learning (MEL) Plan Template
for USAID Tuberculosis (TB) Program Activities**

May 2, 2024





Introductions and Housekeeping

TB DIAH

TUBERCULOSIS DATA, IMPACT ASSESSMENT
AND COMMUNICATIONS HUB

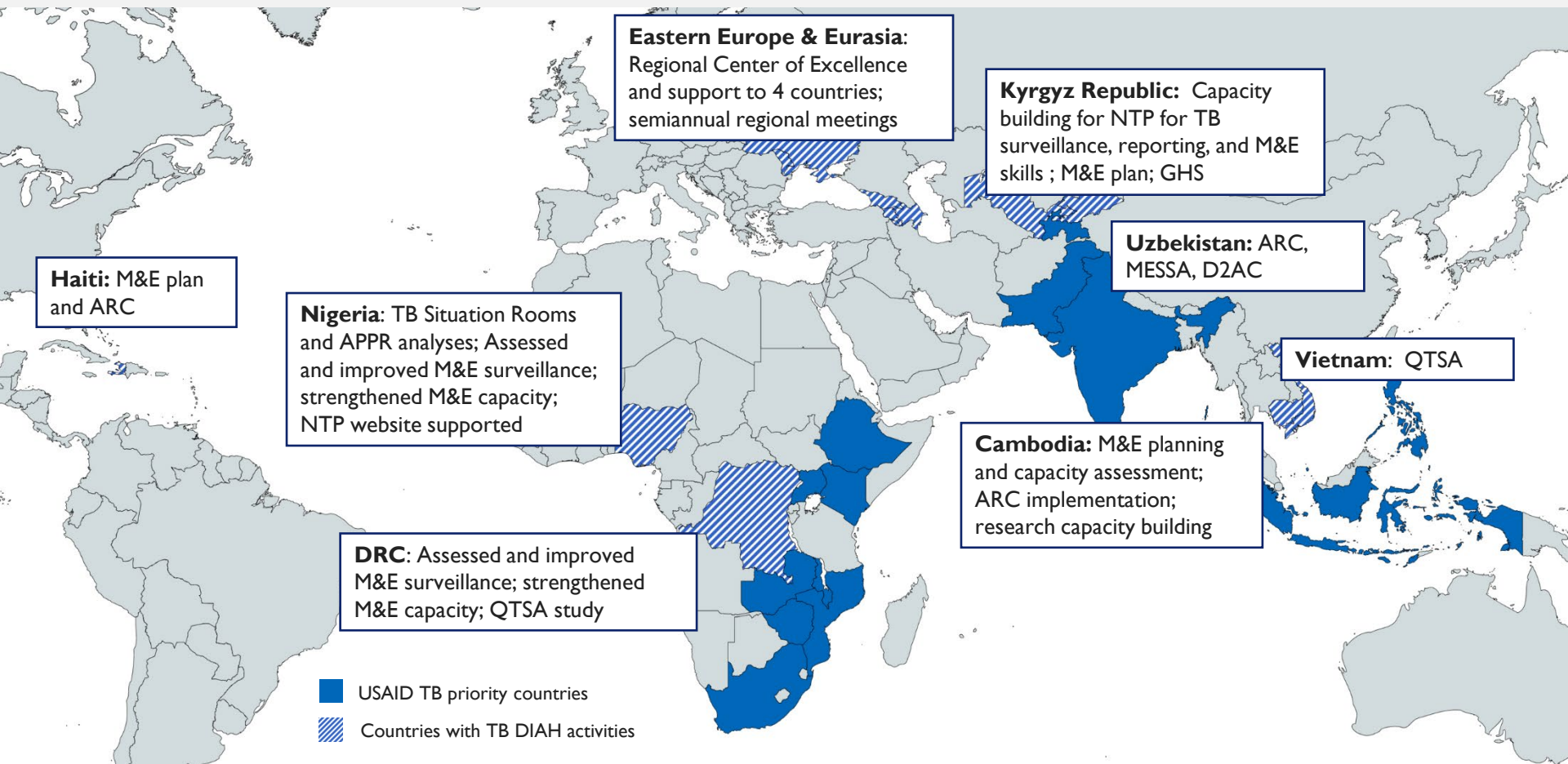
- Part of the USAID Global Accelerator to End TB
- Global, five-year (2018-2023) associate award, \$36M cooperative agreement
- Small team of M&E and TB experts working to clarify TB data in way that helps USAID monitor its TB investments in its TB priority countries
- Helps countries use data to share their story



What does TB DIAH do?



Where does TB DIAH work?



Stephanie Mullen

Project Director
TB DIAH

- Introductions and Housekeeping

Anna Meltzer

TB Country M&E Advisor
USAID/GH/ID/TB

- Background
- Selecting Indicators from USAID's TB Performance-based M&E Framework (PBMEF)

Bridgit Adamou

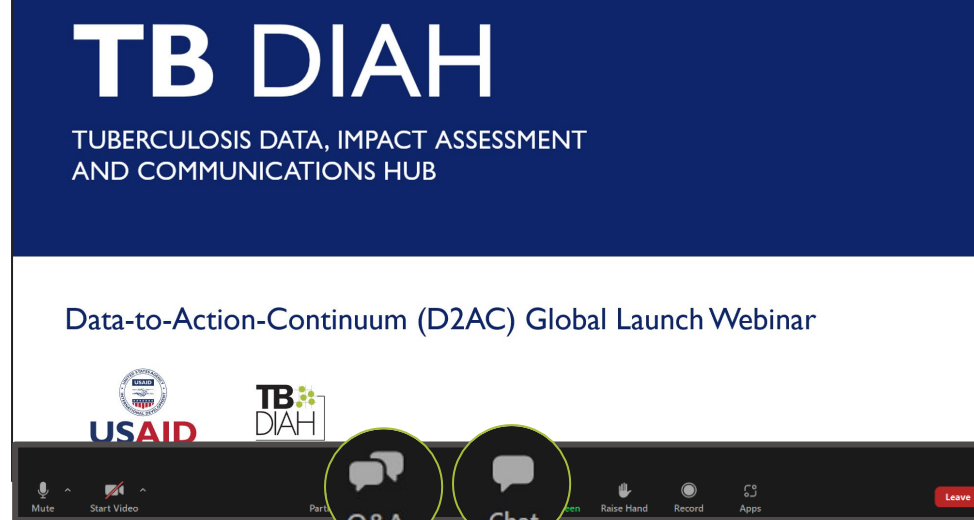
Senior M&E Advisor
TB DIAH

- Exploring the new TB Monitoring, Evaluation, and Learning (MEL) Plan Template
- Accessing the Template

Ann Fitzgerald

Assistant Project Director
TB DIAH

- Q&A



Please use the **Q&A** for all questions.

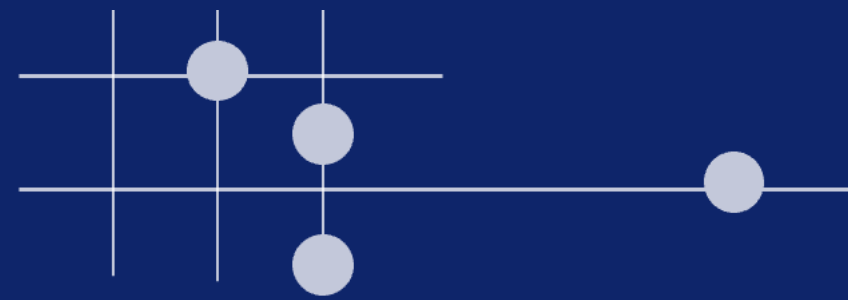
Please tell us who you are and where you're from in the chat.



Questions will be addressed during and at the end of the webinar.



The webinar is being recorded and a link to the recording and presentation will be shared with all attendees and registrants tomorrow by a Zoom link and email.



Background

What is a MEL plan?

- USAID's implementing partners (IPs) use MEL plans to guide their efforts. USAID uses MEL plans to manage activities and track its investments.
- It is important that these MEL plans:
 - ✓ clearly detail how the IP will monitor activity performance and its programmatic and operational context,
 - ✓ and generate learning to adapt the activity's actions based on evidence.
- The MEL plan should be based on the proposed workplan, including the activity's goal and objectives.



What are the main USAID requirements?

- USAID activities must have an approved activity MEL plan before major implementation actions begin. The MEL plan should be drafted within 90 days of an activity being awarded.
 - ✓ Exceptions to this requirement are rare and can only be approved by a Mission Director or, in Washington, by the head of operating unit (OU)
- Activity MEL plans must include: 1) the activity's monitoring approach, including any monitoring processes or information systems, and 2) the activity's procedures for collecting feedback from beneficiaries/stakeholders, responding to feedback, and reporting to USAID on feedback.
 - ✓ Additional requirements on Data Management Plan and Quality Assurance Surveillance Plan



ADS Chapter 201
Program Cycle Operational Policy

Partial Revision Date: 09/28/2022
Responsible Office: PPL
File Name: 201_092822

What are the other parts of the activity MEL plan?

- Activity MEL plans should **be tailored to the specific needs of your TB program activities** and address the following:
 - ✓ Expectations for collaboration between IPs and any external evaluations planned by the Mission or Washington OU;
 - ✓ Any proposed internal evaluations;
 - ✓ Plans for monitoring context and emerging risks that could affect the achievement of the activity's results;
 - ✓ Learning activities, including plans for capturing knowledge at the closeout of activities;
 - ✓ Estimated resources for MEL actions that are part of the implementing partner's budget; and
 - ✓ Roles and responsibilities for all proposed MEL actions.





True or False: MEL plans should be updated regularly.

TRUE! The activity MEL plan should be revised and updated regularly and as needed in response to implementation milestones, changes in the activity, or changes in the activity's context that occur during the life of the activity.

USAID's Standard MEL Plan Template

PROGRAM CYCLE



MONITORING TOOLKIT

ACTIVITY MONITORING, EVALUATION, AND LEARNING PLAN TEMPLATE

Introduction

The template that follows this introductory page provides a suggested development of an Activity Monitoring, Evaluation, and Learning Plan (A implementing partner. As noted in USAID's **ADS 201.3.4.10**: "Activity Activity MEL Plan in place before major implementation actions begin." MEL Plans, see ADS 201.3.4.10. This template should be used in conjunction in USAID [How-To Note: Activity Monitoring Evaluation and Learning P](#)

How to Use This Template

While Activity MEL Plans are required for most activities, this template Agency-wide required structure or format of Activity MEL Plans. This is helpful tool for USAID staff and implementing partners.

USAID Missions and other Operating Units that choose to provide a st template to their implementing partners may adopt this template, adapt of their own. USAID Missions and other Operating Units may also leave structure and format the Activity MEL Plan to their implementing partner USAID implementing partners should consult with their COR or AOR recommendations for their Activity MEL Plan.

The italicized text in each template section provides guidance and recor in that section, including examples and sample text. Required elements additional guidance on Activity MEL plans see the USAID [How-To Note and Learning Plan](#).

Please note that per ADS 579.2.1, all activities that require an Activity Management Plan (DMP). The DMP may be developed and approved as Plan or as a separate plan. For further guidance on Data Management P

ACTIVITY MONITORING, EVALUATION, AND LEARNING PLAN TEMPL

I. Introduction

This section introduces the Activity MEL Plan, describes the structure of the plan, se the plan, and describes how it will be updated.

ACTIVITY THEORY OF CHANGE

Include a brief summary description of the activity theory of change.

LOGIC MODEL

Add a logic model that graphically depicts the activity theory of change. Performanc questions may be added to the logic model where relevant to indicate the connectio theory of change and MEL tasks.

2. Monitoring Plan

Describe the activity's monitoring approach, including monitoring processes and syst

PERFORMANCE MONITORING

Describe the efforts to monitor activity performance.

A summary of the relevant performance indicators of the activity's outputs and out (or plan for collecting baseline), and annual targets should be listed in the Annex.²

CONTEXT MONITORING

Describe any efforts for monitoring the activity's context and emerging risks that could affect the achievement of the activity's results.

3. Beneficiary Feedback Plan³

- Determination on whether collecting beneficiary feedback is appropriate for the activity. If not, then a written explanation for why not.
- Describe procedures for collecting feedback from beneficiaries.
- Describe procedures for responding to feedback from beneficiaries.
- Describe procedures for reporting to USAID.

ACTIVITY MONITORING, EVALUATION, AND LEARNING PLAN TEMPLATE

4. Evaluation Plan

INTERNAL EVALUATION PLAN

If intending to conduct an internal evaluation using USAID funds, then complete the internal evaluation table for each evaluation expected over the life of the activity.

Internal Evaluation Table

| Evaluation Type | Performance or Impact |
|-------------------------------------|-----------------------|
| Evaluation Purpose and Expected Use | |
| Possible Evaluation Questions | |
| Estimated Budget | |
| Start Date | |
| End Date | |

PLANS FOR COLLABORATING WITH EXTERNAL EVALUATORS

If USAID is planning to conduct an external evaluation of this activity, describe how the act with the external evaluation team.

5. Collaborating, Learning, and Adapting Approach

Include learning questions related to the theory of change or knowledge gaps and plans to Describe plans for strategic collaboration with other activities or stakeholders; reflection of implementing partner will use new knowledge and learning for adaptations; and plans for closeout.

6. Resources

Specify the budget allocated to monitoring, evaluation, and learning by listing the tasks, est proportion of the budget.

7. Roles and Responsibilities

Describe the general and individual roles and responsibilities for activity monitoring, evaluat approaches.

8. Schedule of Activity MEL Plan Tasks

Provide a schedule of recurring tasks related to monitoring, evaluation, CLA or other plans during the activity and the individuals who are responsible for them.

ACTIVITY MONITORING, EVALUATION, AND LEARNING PLAN TEMPLATE

Schedule of Recurring Tasks Table

| Tasks | Frequency | Responsible person or team |
|-------|-----------|----------------------------|
| | | |
| | | |
| | | |

9. Schedule of Activity MEL Plan Deliverables to USAID

List the various monitoring, evaluation, and CLA or other learning deliverables (including ad hoc and recurring reports) that will be provided to USAID.

Example Schedule of Activity MEL Plan Deliverables to USAID Table

| Deliverable | Frequency | Transmission to USAID via | Description of Content |
|-------------|-----------|---------------------------|------------------------|
| | | | |
| | | | |
| | | | |

10. Change Log

Describe the changes that are made to the Activity MEL Plan over time.

Example Change Log

| Date: | Change By: | Change to: | Description of Change: |
|----------------------------------|--|---|--|
| <i>Effective date of change.</i> | <i>Person or team who made the change.</i> | <i>Section of the Activity MEL Plan changed. If indicator is changed, include the Indicator No.</i> | <i>Summarize the change that was made to the Activity MEL Plan and the reason the change was made.</i> |
| | | | |

Why do you need to use a TB-specific MEL plan?

The ASK → Create a MEL plan template that incorporates the TB **PBMEF**, includes **more guidance**, and is **user-friendly**. As a result, a new TB-specific MEL plan was created that:

- Includes USAID's Global TB Strategy 2023-2030
- Incorporates the TB PBMEF and explains how TB PBMEF indicators should be included into MEL plans
- Provides more explanations and practical guidance for users
- Includes links to additional resources
- Provides an example of a completed TB activity MEL plan
- Provides a blank TB MEL plan template

Updated MEL Plan Template for USAID TB Activities



https://www.tbdiiah.org/wp-content/uploads/2024/02/MEL-Plan-Template-for-TB_MS-24-233_508.pdf

New template and guidance for developing a USAID activity MEL plan for IPs working in the field of TB.

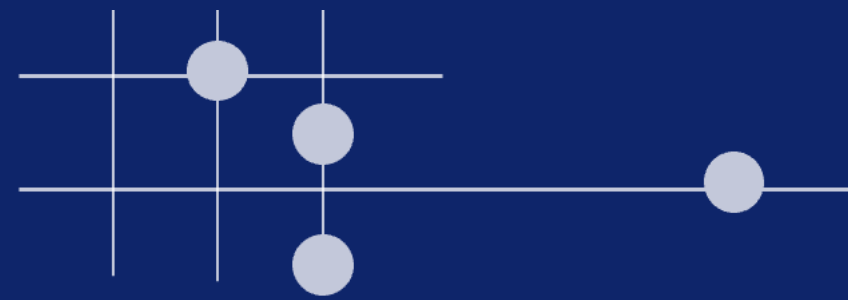
Primary audience for this guidance:

- USAID IPs with USAID TB funds and required to develop a MEL plan.
- USAID Contracting Officer Representatives (CORs)/ Agreement Officer Representatives (AORs), Activity Managers, Program Office, and M&E Specialists.



True or False: An activity MEL plan is typically developed by implementers post-award before major activity implementation begins.

TRUE! Yes, USAID implementing partners should develop their MEL plan post-award before major implementation actions begin, and within 90 days of an activity being awarded.



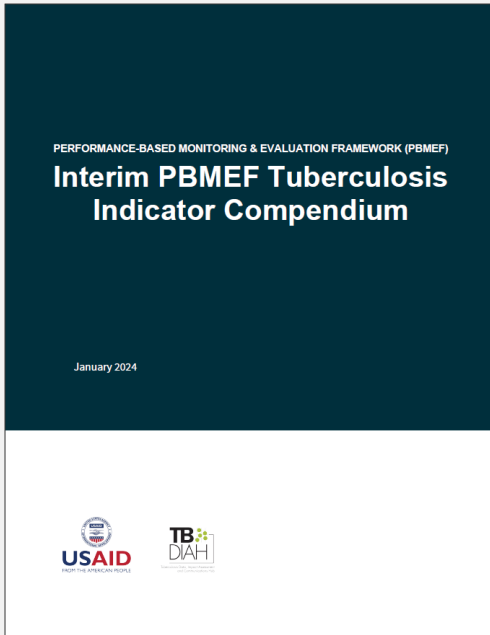
Selecting Indicators from the USAID TB PBMEF

The TB PBMEF Framework

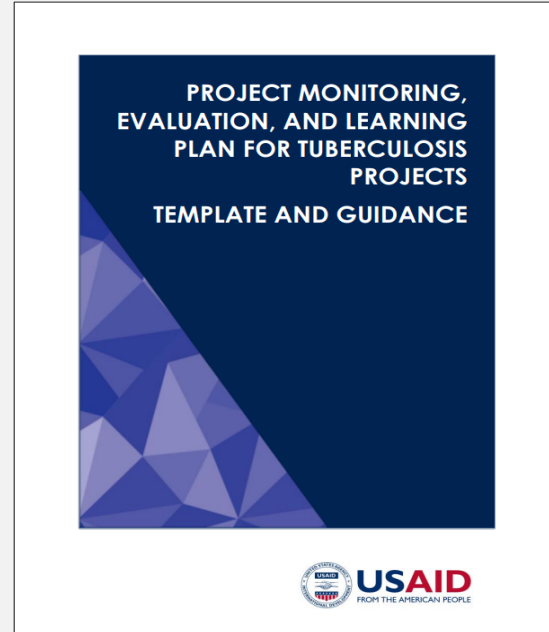
Current Updated Resources Available



www.tbdiiah.org/assessments/pbmef/

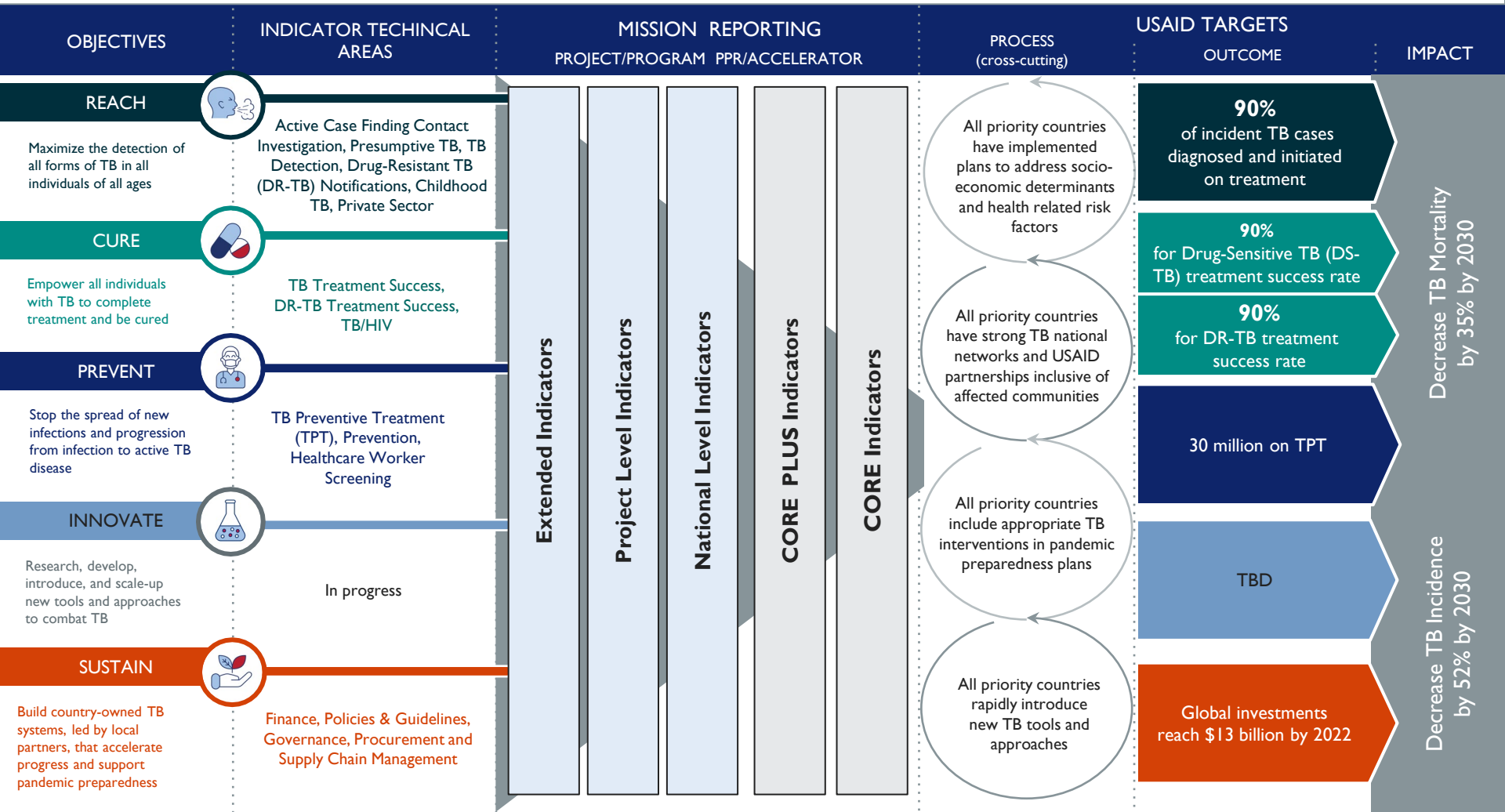


[Interim PBMEF Indicator Compendium](#)



[MEL Plan Template and Guidance](#)

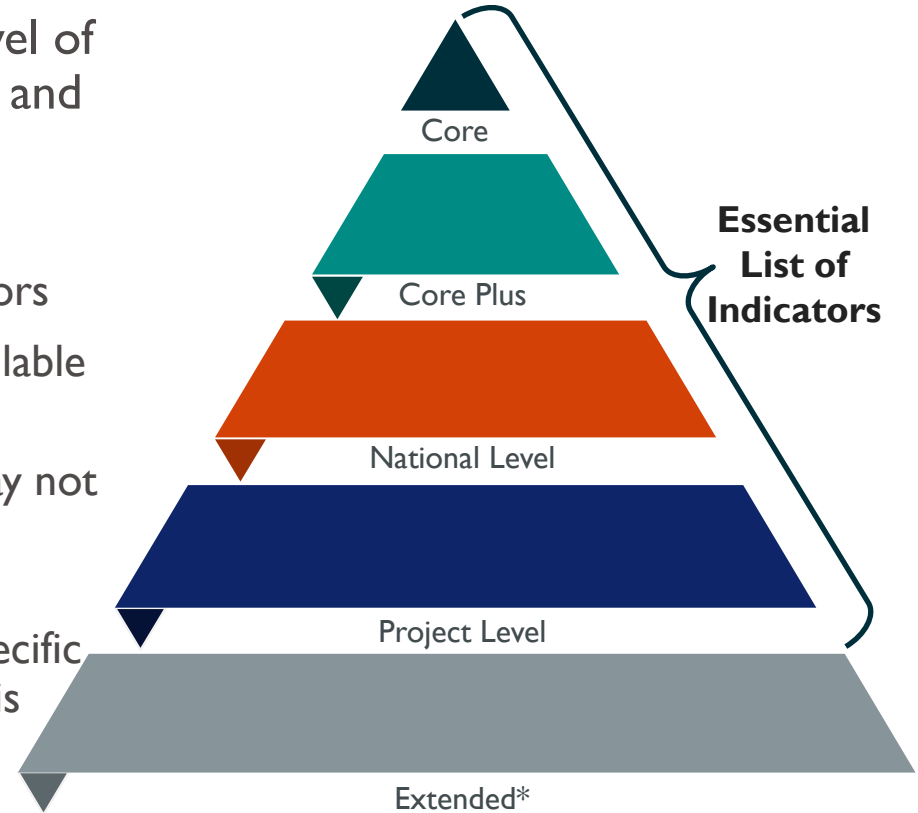
TB MEL INDICATORS







Approaches for TB PBMEF Indicator Selection

It is important to select the right indicators for your TB activity's technical areas and the level of TB indicators to measure the contributions and attributions to overall outcomes.

- **Core:** established 10 priority indicators
- **Core Plus:** more detail on the Core indicators
- **National:** additional data that should be available at the national level
- **Project:** additional steps in cascades that may not be available at the national level
- **Extended:** index of additional standardized indicators to help meet project needs for specific activities, if more detail is wanted than what is provided by essential indicators



*Note: Extended indicators are currently under revision

| OBJECTIVES & TARGETS | PPR/ACCELERATOR | ACCELERATOR | MISSION REPORTING | |
|---|--|---|--|---|
| | CORE INDICATORS (10) | CORE PLUS (11) | NATIONAL LEVEL (16) | PROJECT LEVEL (30) |
| REACH Improve access to high-quality, patient-centered TB, drug-resistant TB (DR-TB) and TB/HIV services  90% diagnosed and on treatment | DT_RT: TB Detection Rate BAC_CON: Percent Bacteriologically Confirmed PEDS_NOTIF: Childhood TB Notifications MDR_NOTIF: RR/MDR Notifications PR_NOTIF: Private Sector TB Notifications CON_SCRN: Percent of Contacts with Contact Investigation Initiated | NEWREL_WRD: Rapid diagnostic testing at time of initial diagnosis NEWREL_DST: Percent of people with new and relapse TB with drug susceptibility testing (DST) RET_DST: Percent of people with previously treated TB with drug susceptibility testing (DST) XDR_NOTIF: Pre-XDR/XDR notifications | PEDS_BAC_CON: Percent of children and adolescents (0-14 years) with new and relapse pulmonary TB who are bacteriologically confirmed PEDS_MDR_NOTIF: MDR-TB notifications among children and adolescents (0-14 years) DT_CI_INIT: Percent of people with notified TB with a contact investigation initiated <i>(more indicators than listed here)</i> | DT_SCRN: Number of people screened for TB DT_SCRN_COMM: Number of people screened for TB disease outside of health facilities DT_PRES: Number of people with presumptive TB <i>(more indicators than listed here)</i> |
| CURE Improve TB service delivery  90% DS and DR-TB treatment success rate | DS_TSR: DS-TB Treatment Success Rate DR_TSR: DR-TB Treatment Success Rate | TX_DR_ENROLL: DR-TB enrolled on treatment TX_STR_ENROLL: DR-TB "all oral" short regimen initiations TX_LTR_ENROLL: DR-TB "all oral" longer regimen initiations TX_DR_ADR: Number of people with adverse reactions to DR-TB treatment | TX_DS_OUT: DS-TB treatment outcomes TX_DR_OUT: DR-TB treatment outcomes PEDS_TSR: Treatment success rate in children and adolescents (0-14 years) PLHIV_TSR: Treatment success rate PLHIV TX_DS_ENROLL: DS-TB treatment initiations | TX_DS_SUPPORT: Percent of people on DS-TB treatment who received treatment support TX_DR_SUPPORT: Percent of people on DR-TB treatment who received treatment support <i>(more indicators than listed here)</i> |
| PREVENT Increase prevention of TB transmission & disease progression  30 million on TB preventive treatment | TPT_ENROLL: TPT Initiations | TPT_CON_ENROLL: TPT initiations among contacts TPT_COMPL: TPT completions | TPT_CON_04: Number of TPT initiations among contacts <5 TPT_PLHIV_ENROLL: Number of TPT initiations in PLHIV | HCW_SCRN: Percent of HCWs screened for TB HCW_TBI_POS: Percent of HCWs diagnosed with TBI TPT_ADR: Number of people with adverse reactions to TPT <i>(more indicators than listed here)</i> |
| SUSTAIN Increase commitment for the sustainability of TB efforts  Global investments reach \$22 billion by 2027 | SN_DOMESTICR: Domestic Financing | SN_TB_INSUR: Existence of national or social health insurance system whose benefit package includes TB clinical services | SN_MQS: TB drugs meeting international minimum quality standards SN_CQI: Continuous Quality Improvement (CQI) program in place | STKOUT_FLD: Stockout of any first-line TB treatment drugs STKOUT_SLD: Stockout of any second-line TB treatment drugs STKOUT_WRD: Stockout of TB rapid molecular test and related commodities <i>(more indicators than listed here)</i> |

Decrease TB Mortality

Decrease TB Incidence

Interim TB PBMEF Indicator Matrix (Excel)



www.tbdiah.org/assessments/pbmeff

| Category | Previous # | Indicator_short | Indicator Name | PBMEF Level | Definition | Numerator | Denominator | | |
|----------|------------|-----------------|--|-------------|---|---|--|--|--|
| Reach | DT-3 | DT_RT | TB Detection Rate (Treatment Coverage) | Core | Percent of people with new and relapse TB and with unknown previous TB treatment history (all forms) who were notified during the reporting period, out of the estimated number of people with incident TB for that year. Note: This indicator is also referred to as "Treatment Coverage Rate"; the name is updated to TB detection rate here to emphasize that treatment coverage is not represented in this data. Calculation: (Numerator/Denominator) x 100 | Number of people with new and relapse TB (and with unknown previous TB treatment history), all forms (bacteriologically confirmed plus clinically diagnosed, pulmonary and extra pulmonary), who were notified in the reporting period. | Estimated incidence of TB (all forms) in the same reporting period | | |
| Reach | DT-12 | BAC_CON | Percent Bacteriologically Confirmed | Core | Percent of people with new and relapse pulmonary TB who are bacteriologically confirmed. Bacteriologically confirmed: Smear positive for TB or culture positive for TB or positive for TB by a World Health Organization-recommended rapid diagnostics test (WRD): FluoroType® MTBDR (Hain), Loopamp™ MTBC detection kit (TB-LAMP), Xpert® MTB/RIF, Xpert® MTB/RIF Ultra, Truenat® MTB or MTB Plus, RealTime TB (Abbott), BD MAX™ MDR-TB, cobas® MTB (Roche), or LF-LAM. Note: LF-LAM is included as a recommended TB test for people living with HIV (PLHIV). LF- LAM is not recommended to confirm TB in all populations and notably should not be used in outpatient settings for adults, adolescents, and children without symptoms of TB or in those with a CD4 count > 200 cells/mm3. At the time of this publication, Alere Determine™ TB LAM Ag is the only commercially available LF-LAM test. Full guidance on the use of LF-LAM can be found at: www.who.int/publications/i/item/9789241550604 Calculation: (Numerator/Denominator) x 100 | Number of new and relapse bacteriologically confirmed pulmonary TB notifications (smear positive or culture positive or positive by WRD during the reporting period) | Number of people with new and relapse pulmonary TB (bacteriologically confirmed plus clinically diagnosed) during the reporting period | Age (0-4, 5-14, 15+), sex, HIV status | new_labconf plus rel_rel_labconf divided by new_clindx plus rel_rel_clindx plus new_labconf plus rel_rel_labconf |
| Reach | CH-5 | PEDS_NOTIF | Childhood TB Notifications | Core | Number of children and adolescents (0-14 years) with new and relapse TB or with unknown previous TB treatment history, all forms, who were notified in a reporting period | Number of children and adolescents (0-14 years) with new and relapse TB or with unknown previous TB treatment history, all forms, who were notified in a reporting period | N/A | Age (0-4, 5-9, 10-14), sex, HIV status | newrel_f014 plus newrel_m014 plus newrel_sexunk014 |
| Reach | RN-1 | MDR_NOTIF | RR/MDR-TB Notifications | Core | Number of people with rifampicin-resistant (RR) and multidrug-resistant (MDR) TB notified during the reporting period. RR/MDR TB, RR TB is TB caused by Mycobacterium | Number of people with RR-TB and MDR-TB notified during the reporting period | N/A | Age (<15, 15+), sex | conf_rr_nfqr |

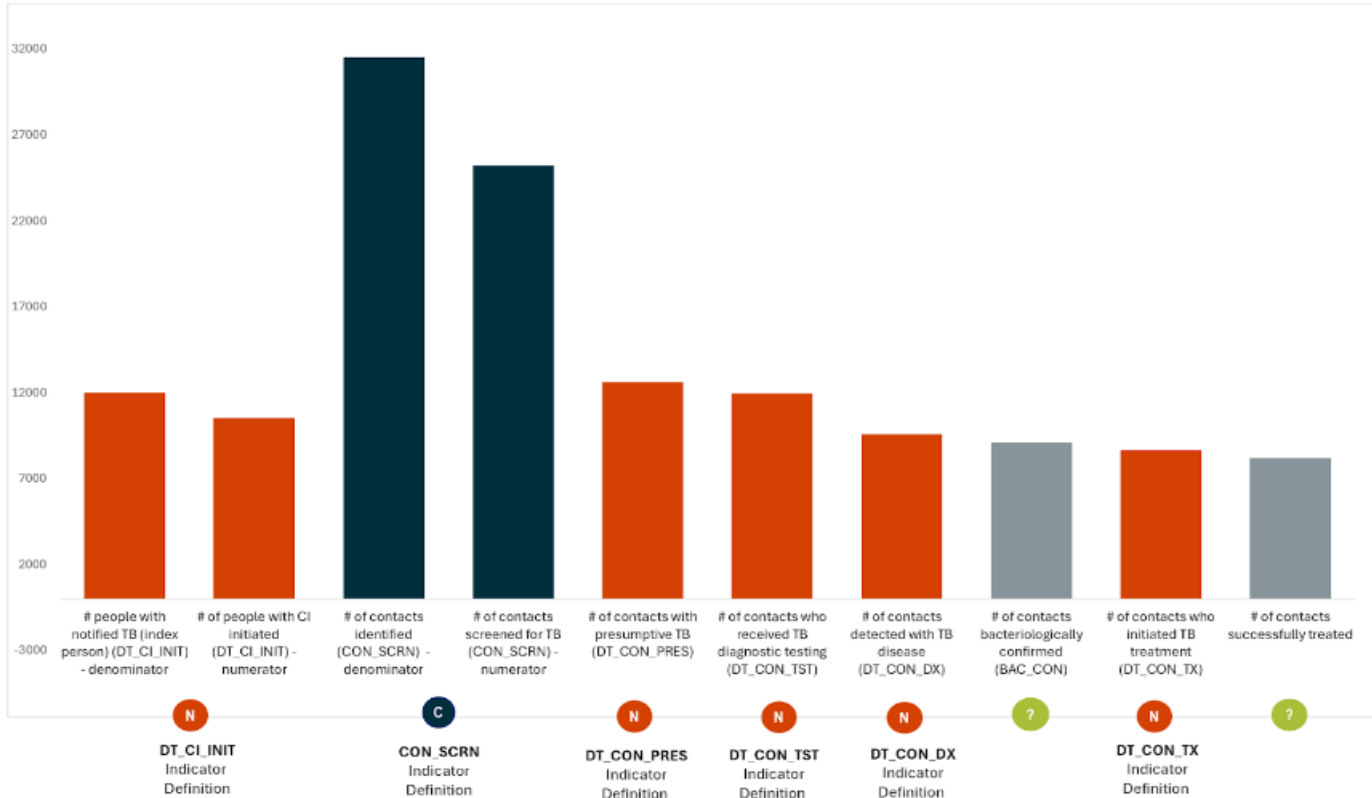
Indicator Reference Sheets

- Comprehensive information about each TB indicator
- Assists with standardized data collection and reporting
 - ✓ e.g. TB Treatment Coverage Rate

| Indicator name and number | DT_RT: TB Detection Rate (Treatment Coverage) Previously [DT-3] |
|---------------------------|---|
| Definition | Percent of people with new and relapse TB and with unknown previous TB treatment history (all forms) who were notified during the reporting period, out of the estimated number of people with incident TB for that year. Note: This indicator is also referred to as "Treatment Coverage Rate"; the name is updated to TB detection rate here to emphasize that treatment coverage is not represented in this data. Calculation: (Numerator/Denominator) x 100 |
| Numerator | Number of people with new and relapse TB (and with unknown previous TB treatment history), all forms (bacteriologically confirmed plus clinically diagnosed, pulmonary and extra pulmonary), who were notified in the reporting period. |
| Denominator | Estimated incidence of TB (all forms) in the same reporting period. |
| Category | REACH |
| Indicator type | Core outcome |
| PBMEF level | Core |
| Unit of measure | Percent of estimated TB |
| Data type | Percentage |
| Disaggregate by | Age (<15, 15+), sex |
| Reporting level | All Core PBMEF indicators should be reported at the national level; data may also be collected subnationally for more granular monitoring. |
| Reporting frequency | This indicator should be reported on a semiannual basis at a minimum. More frequent monitoring on a quarterly or monthly basis is recommended. Performance plans and reports (PPRs) for this indicator are based on calendar year (CY) periodicity to reflect national level attainment and align with the USAID congressional reporting requirements. |
| Data sources | The numerator is reported from National TB Program (NTP) official records. <i>Quarterly report on TB case registration in the basic management unit.</i> This indicator is related to incident TB; therefore, the following category of patients should not be included in the data reported: <ul style="list-style-type: none"> • Treatment after failure patients (previously been treated for TB and whose treatment failed at the end of their most recent course of treatment) • Treatment after loss to follow-up patients (previously been treated for TB and were declared lost to follow-up at the end of their most recent course of treatment) • Other previously treated patients Care should be taken to properly address common issues in reporting such as patients transferring in and out of facilities. National reporting guidelines should be followed to ensure all people with TB are reported and not double counted. The denominator is available from the current World Health Organization (WHO) Global TB Report for the 30 TB high-burden countries and on the WHO country profile for all countries published on the WHO website. It is an estimation calculated annually based on a mathematical model. This is a standard WHO indicator. Referring to the WHO database, the variable for the numerator is <i>c_newinc</i> and the variable for the denominator is <i>e_inc_num</i> . |

Illustrative Indicators Cascades (in progress): TB CI - Positive TB

TBCI Cascade - Contacts who screen positive for active TB

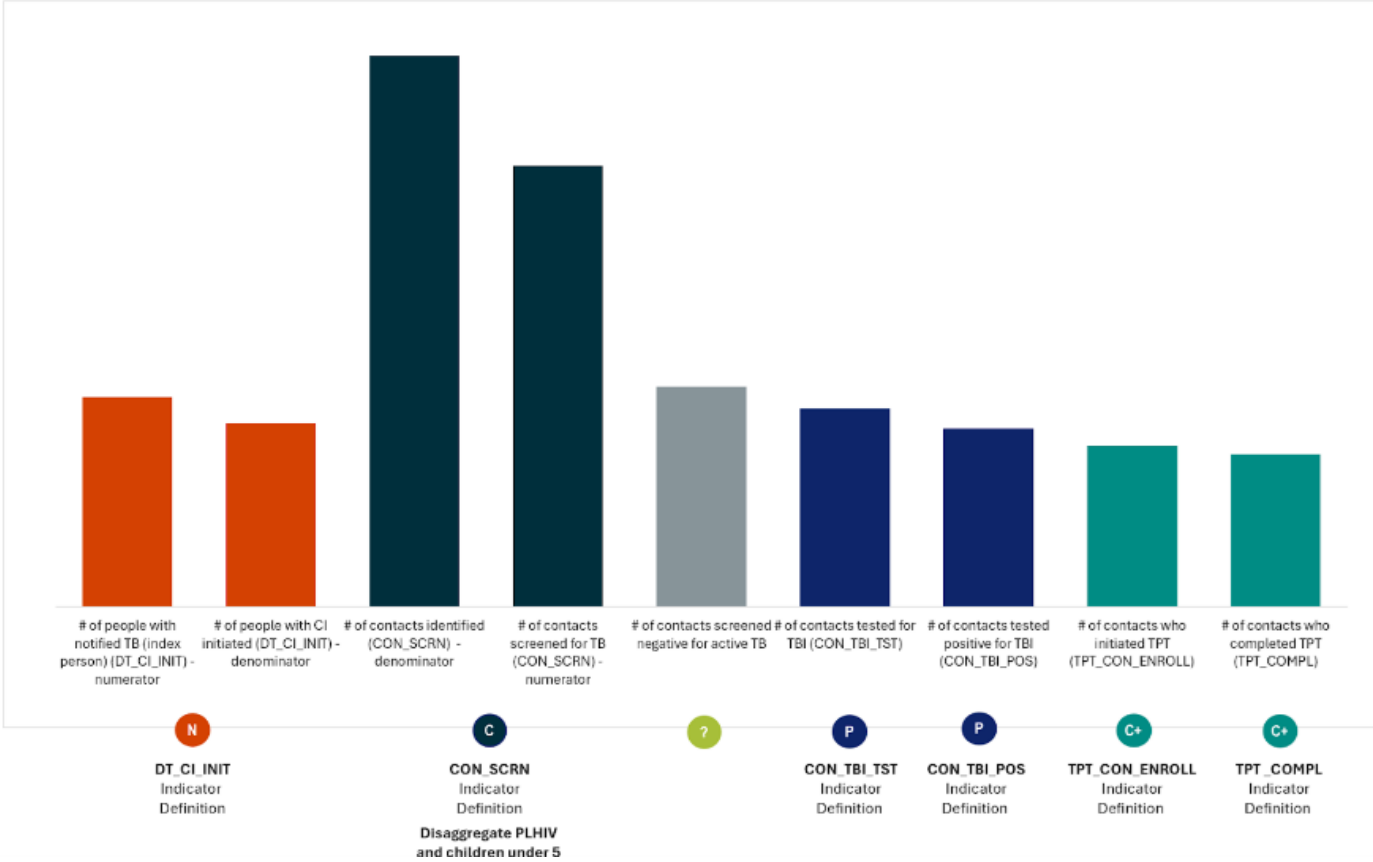


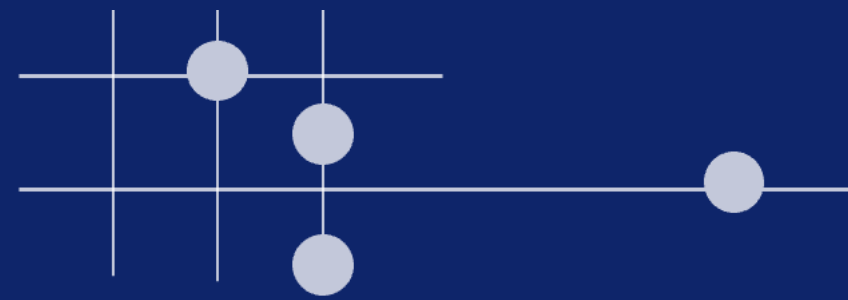
DRAFT

Illustrative Indicators Cascades (in progress): TB CI - Negative TB

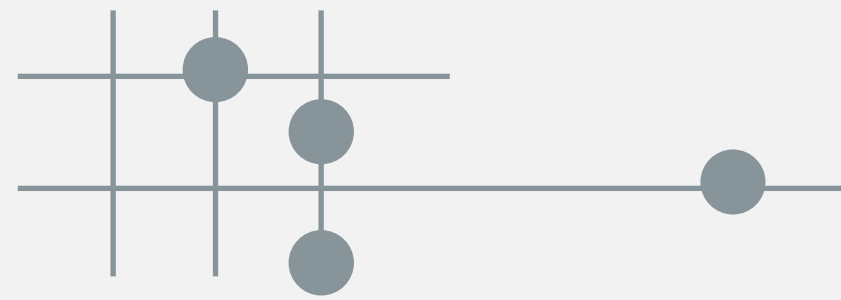
TBCI Cascade - Contacts who screen negative for active TB

DRAFT





Exploring the New TB MEL Plan Template



PART I: MEL PLAN TEMPLATE WITH INSTRUCTIONS

I. Overview

- Title page
- List of abbreviations
- Table of contents

1.1 TITLE PAGE

Include a title page to your MEL plan with the information and branding presented in the template below.

[PROJECT TITLE] Monitoring, Evaluation, & Learning Plan

Approved Date: [e.g., April 2024]

Version: [1]

Contract/Agreement Number: [Insert number]

Project Start and End Dates: [e.g., January 1, 2024 to December 31, 2028]

AOR/COR/Activity Manager Name & Office: [Insert name, office]

Submitted by: [Insert name, position; name of prime implementing partner]

Implementing Partners: [Insert names of partner organizations]

DISCLAIMER

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

II. Introduction

- Project's theory of change
- Results framework
- Critical assumptions

Key Message: A results framework should clearly demonstrate how a project is contributing to the 90-90-90+ prevention strategic results.

Table 1. Mapping activities and interventions to the PBMEF indicators

| PBMEF Indicators | | | How the project activity or intervention will contribute to the respective indicator |
|------------------|-----------------------------|-----------------------|--|
| Indicator | Indicator Tier [†] | Category [‡] | |
| | | | a. b. |
| | | | a. b. |

*Core, Core Plus, National Level, Project Level, or Extended

† Reach, Cure, Prevent, Innovate, or Sustain

III. Monitoring Plan (Required)

- Performance monitoring
- Context monitoring

Key Message: Every project that is receiving USAID TB funds—even if it is a relatively small amount in an integrated project—must include PBMEF indicators to demonstrate their contribution to the TB indicators.

Table 2. Indicator summary table

| PBMEF reference | Indicator | Definition with numerator & denominator | Indicator source | Data source | Frequency | Unit of measure | Disaggregations | PPR (Y/N) | Baseline | | Targets | | | | | |
|-----------------|-----------|---|------------------|-------------|-----------|-----------------|-----------------|-----------|----------|-------|---------|------|------|------|------|-----------------|
| | | | | | | | | | Date | Value | Yr1 | Yr 2 | Yr 3 | Yr 4 | Yr 5 | Life of project |
| | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |



True or False: For the core TB indicators included in an activity's MEL plan, IPs should report on both activity level and national level data.

TRUE! This allows IPs to demonstrate the project's contribution to national level targets and attribution of service delivery interventions by geographic areas.

IV. Data Collection

- Data collection
- Data analysis

Table 3. Data collection table

| Data generator | Data collection tool | Type of data collected | Data capture system | Data source | Frequency |
|-----------------------------|------------------------------------|---|----------------------------------|--------------------|-----------------------|
| <i>Training facilitator</i> | <i>Training sign-in sheet</i> | <i>Name, sex, email, and affiliation of training participants</i> | <i>Paper-based</i> | <i>Primary</i> | <i>Every training</i> |
| <i>Facility nurse</i> | <i>Health facility TB register</i> | <i>Patient ID number, type of service rendered, treatment management & treatment outcomes</i> | <i>Electronic summary report</i> | <i>Primary</i> | <i>Monthly</i> |
| | | | | | |
| | | | | | |

Sections V and VI

Section V: Data Management and Quality Assurance (Required)

This explains how data will be managed at all stages. This includes data collection, quality assurance, repository, security, analysis, sharing, and use.

Section VI: M&E of Gender

Explain how your M&E activities can help determine whether your TB activities promote gender equity or may exacerbate gender inequalities. Describe how gender is being addressed under your project's results and approaches.

Key Message: USAID has a requirement that holds IPs “responsible for complying with obligations under the contract or agreement to integrate gender in programming, which may include developing gender-sensitive indicators that measure specific gender-related goals for each project and/or activity, where relevant.”

Sections VII, VIII, IX, and X

Section VII: Evaluation Plan

- Internal evaluation
- Plans for collaborating with external evaluators

Section VIII: Collaborating, Learning, and Adapting Approach

Include the project's learning priorities and how the project will communicate its achievements and learning.

Section IX: Stakeholder Feedback Plan (Required)

Determine whether collecting stakeholder feedback is appropriate for the project.

Section X: Resources

Specify the budget allocated to MEL activities.

Sections XI and XII

Section XI: Roles, Responsibilities, and Schedules

- Schedule of Activity MEL plan tasks
- Schedule of MEL plan deliverables to USAID

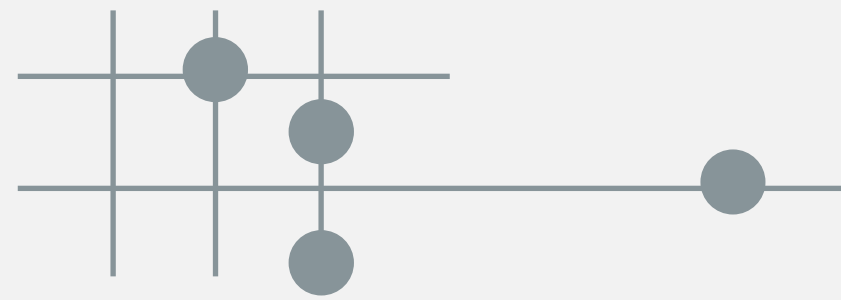
Table 6. Schedule of MEL plan deliverables to USAID

| Deliverable | Reporting Frequency | Description of Content |
|-------------|---------------------|------------------------|
| | | |
| | | |

Section XII: Change Log

Table 7. Change log

| Date | MEL Plan Section | Summary of Change | Rationale for Change and Any Notes |
|---------------------------------|---|-----------------------------------|---|
| <i>Effective date of change</i> | <i>Specify what element(s) in the MEL plan were changed</i> | <i>Summarize what was changed</i> | <i>Provide a reason for the change(s)</i> |
| | | | |
| | | | |



PART 2: SAMPLE TB MEL PLAN

Decreasing Tuberculosis in Zaccosa (DETIZA) Activity



Figure 2. DETIZA results framework

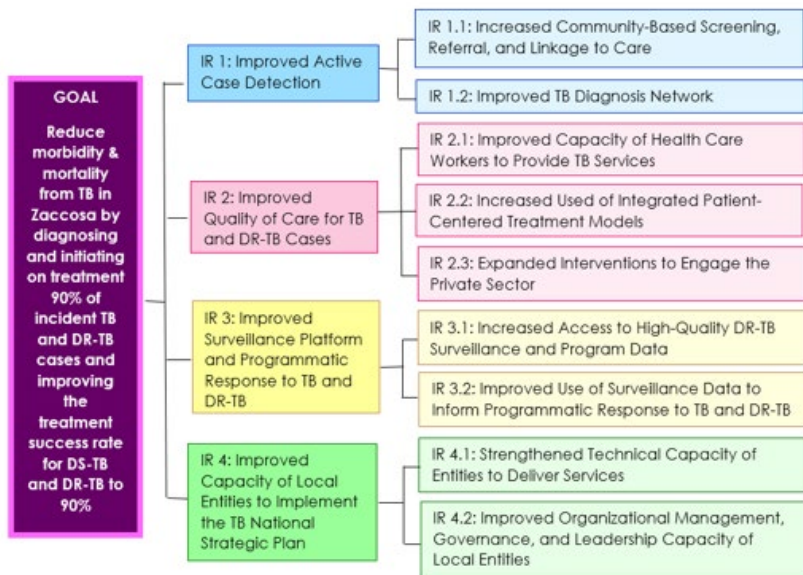
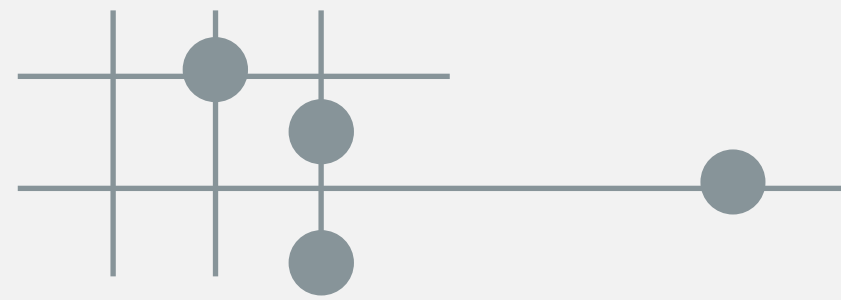


Table 4. Data collection periods with method of data collection and staff responsible

| Data collection period | Method of collection | Type of data collected using this method | Source Documents | Responsible Staff |
|------------------------|---|---|---|---|
| Monthly | District meeting with area leaders, NTP supervisors, and project activists for compiling, verifying, validating, and analyzing data | Compilation of the project's performance indicators against targets from primary data sources from DETIZA activists and health facilities. | Activists' community activity register; TB, DR-TB, MDR-TB, and XDR-TB registers; and CCR register | DETIZA district area leader and NTP district supervisor |
| Weekly | Weekly data revision meeting in health facilities to review and correct project data | Project data to closely monitor progress on TB and DR-TB detection and treatment initiations, index contact investigation, contact screening, TPT initiation, and LTFU on second line treatment | HCWs, activists' community activity register, TB and DR-TB registers, and CCR register | Health facility TB focal point, DETIZA activists |

Table 5. The purpose, key questions, methodology, and timeline for project evaluations

| Type | Annual Pause and Reflect Session | Baseline Assessment and Midterm Evaluation | Final Outcome Evaluation |
|--------------------------|---|---|---|
| Purpose | To track project progress performance and identify areas for improvement and/or apply lessons learned where necessary | Conducted at baseline and mid-way through the project, to focus on the progress made in project implementation against the program objectives | To assess the extent to which project long-term outcomes, targets, and goal were achieved |
| Key Evaluation Questions | How has the project performed in terms of reaching targets? | What is the status of key NTP outcome indicators in project provinces and districts? | Did the project achieve its targets and goal? |



PART 3: BLANK MEL PLAN TEMPLATE

III. DATA COLLECTION

Data Collection Plan

| Data generator | Data collection tool | Type of data collected | Data capture system | Data source | Frequency |
|----------------|----------------------|------------------------|---------------------|-------------|-----------|
| | | | | | |
| | | | | | |

IV. DATA MANAGEMENT AND QUALITY ASSURANCE

V. M&E OF GENDER

VII. EVALUATION PLAN

6.1 INTERNAL EVALUATION PLAN

Internal Evaluation Plan

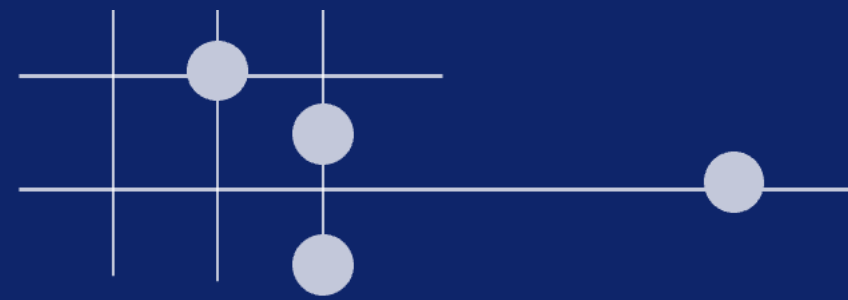
| | |
|-------------------------------|--|
| Evaluation Type | |
| Purpose and Expected Use | |
| Possible Evaluation Questions | |
| Estimated Budget | |
| Start Date | |
| End Date | |

6.2 PLANS FOR COLLABORATING WITH EXTERNAL EVALUATORS

VII. COLLABORATING, LEARNING, AND ADAPTING APPROACH

XII.2 STANDARD INDICATOR REFERENCE SHEET

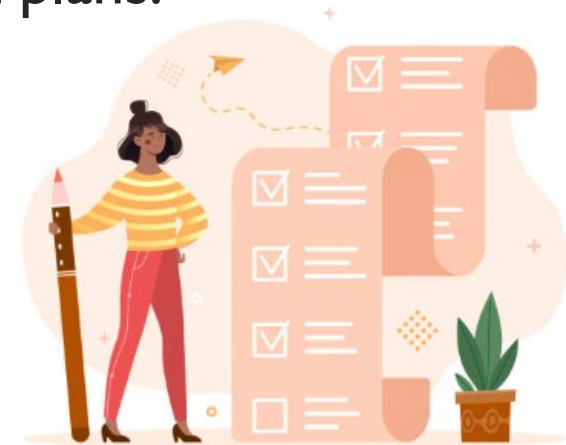
| | |
|-----------------------------|---|
| Indicator name and number | |
| Definition | |
| Numerator | |
| Denominator | |
| Category | <i>(reach, cure, prevent, sustain, or innovate)</i> |
| Indicator type | <i>(output, outcome, impact)</i> |
| PBMEF level | <i>(core, core plus, national, or project)</i> |
| Unit of measure | <i>(ex. percent of cases, number of people)</i> |
| Data type | <i>(ex. percentage)</i> |
| Potential disaggregation(s) | <i>(ex. age, sex, public or private facility)</i> |
| Reporting level | <i>(recommendation based on indicator and indicator level)</i> |
| Reporting frequency | <i>(recommendation based on indicator and indicator level)</i> |
| Data source(s) | <i>(data source plus WHO indicator equivalent, if applicable)</i> |
| Importance | <i>(narrative)</i> |
| Data use and visualization | <i>(narrative plus visuals such as tables or charts)</i> |

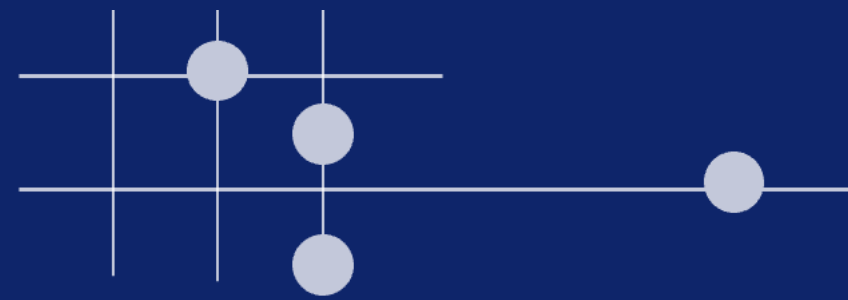


How to Access the MEL Template

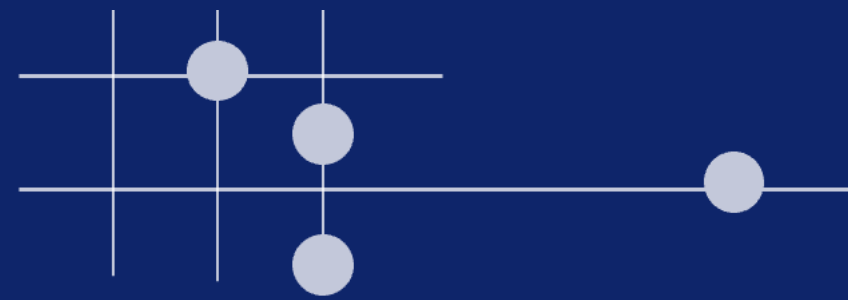
<https://www.tbdiah.org/assessments/pbmef/>

The website includes a PDF of the TB MEL plan template and a Word version so IPs can draft their own MEL plans.





Q&A



Thank You!

For more information

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