MEPI Project
Performance Reporting System

Implementer's Guide

January 4, 2008

U.S.-Middle East Partnership Initiative

MEPI

Democracy • Education • Economy • Women

TABLE OF CONTENTS

Acronyms

GO	Grants Officer
MEPI	Middle East Partnership Initiative
PRS	Performance Reporting System
PO	Project Officer
PU	Planning Unit
QR	Quarterly Report
RMP	Results Monitoring Plan
SoW	Statement of Work
WP	Workplan

I. Introduction

To facilitate consistent and effective management of its assistance portfolio, the Middle East Partnership Initiative (MEPI) has adopted a standardized approach to project monitoring and evaluation. From the project implementers' standpoint, this approach clarifies what information implementers should report and streamlines the project planning and reporting process. A key element of MEPI's project monitoring and evaluation approach is the **MEPI Performance Reporting System (PRS)**, a secure, online database that stores project data and facilitates implementer submission of planning documents and quarterly reports.

This guide describes the standardized project planning and reporting process and presents detailed instructions for implementers on how to access the PRS to submit project information.

II. MEPI Standardized Planning & Reporting Tools

MEPI project monitoring and evaluation is based on the project statement of work (SoW) incorporated into each MEPI award. The SoW describes the shared understanding reached between MEPI and the implementer regarding the project's scope, strategy, and planned accomplishments.

Specifically, the SoW:

- States the overall MEPI goal the project supports;
- Defines in specific terms the project's intended outcomes and project objectives to be achieved;
- Establishes performance indicators to measure progress against the objectives and intended outcomes;
- Identifies major activities to be undertaken to reach the objectives and lists activity milestones.

Planning Tools

Two key tools used by implementers to plan their project include:

- **Results Monitoring Plan** (RMP) – Each project has designated performance indicators to measure progress towards its objectives and intended outcomes as set forth in the SoW; the RMP provides a precise definition of each indicator and describes how indicator data will be collected, including the data source, who will be responsible for data collection, and the frequency with which it will be collected. The RMP also establishes baseline data values and date of baseline measures.
- **Workplan** –The workplan identifies the key activities the project will undertake to reach its objectives and assigns an expected completion date for each activity. The workplan includes the major activities cited in the SoW as well as any additional key activities the implementer believes are necessary to reach each objective.

A standardized template has been adopted for each of these tools. The templates and instructions for completing them using the online PRS are contained in subsequent sections of this guide.

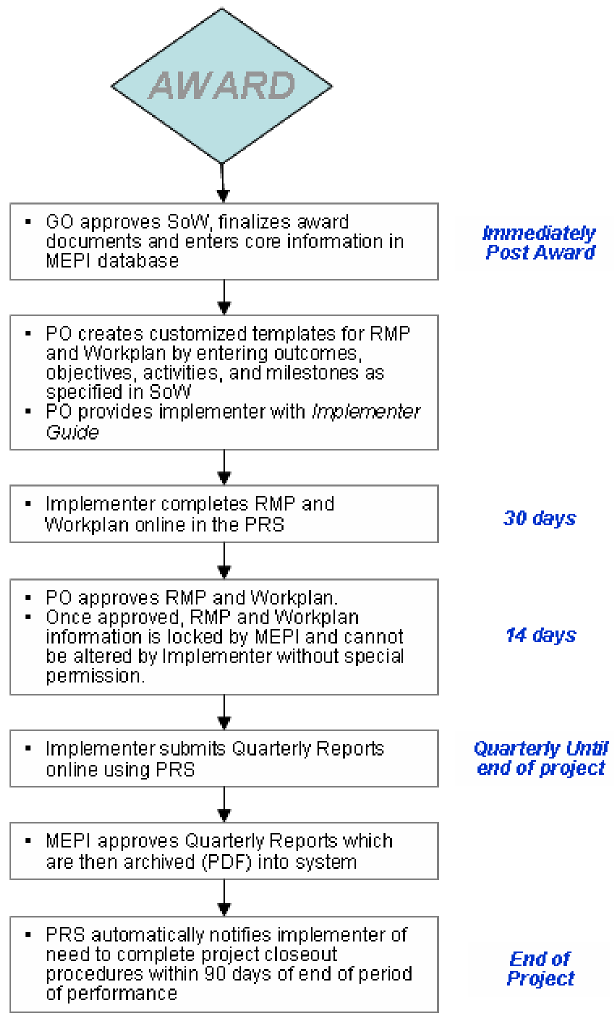
The Quarterly Report

To streamline reporting and clarify the desired content of implementer reports, MEPI has adopted a standardized **Quarterly Report** (QR) template. The QR includes four components:

1. Overall assessment (implementer self-assessment of progress);
2. Results data for the indicators in the RMP;
3. Workplan progress;
4. Brief narrative sections including an Executive Summary.

By linking progress reporting directly to the workplan and RMP, and providing a template for reporting, MEPI quarterly reporting focuses the attention of both implementers and staff on project results.

MEPI Project Planning and Reporting Cycle



Key Definitions

To avoid ambiguity in project planning, monitoring and reporting, MEPI has adopted the following standardized terms to describe important project elements. These terms are used throughout SoWs, workplans, RMPs and QRs.*

Definitions of Terms Used in Describing the Project Strategy

- **Goals:** The MEPI strategic goal(s) to which the project is expected to contribute.
- **Intended outcome(s):** The purpose for undertaking the project.
- **Objectives:** The specific achievements that will substantially contribute to achievement of the intended outcome(s).
- **Activities:** Project actions that contribute to achievement of the objectives.

* Projects awarded prior to the creation of the MEPI Project Monitoring System may find other language used in their SoWs to describe the same or similar concepts.

Definitions of Terms Used in Measuring Progress

- **Indicators:** The measures used to gauge progress toward achieving intended outcome(s) and objectives.
- **Milestone:** Target date for accomplishment of an activity.

III. Using the MEPI Performance Reporting System

An integral part of the MEPI monitoring and evaluation system is an interactive database that stores information about each MEPI project and provides reports to State Department officials and MEPI managers about the status of each project. MEPI implementers link into this database via the MEPI Performance Reporting System (PRS), an interface that allows implementers to submit their project planning documents and quarterly reports directly online. Implementers can also submit administrative requests directly to the relevant MEPI staff member. The system allows MEPI Project and Grants Officers to review and approve implementer planning documents and quarterly reports online.

Instructions on how to access the system and on how to carry out each of the above actions are provided below.

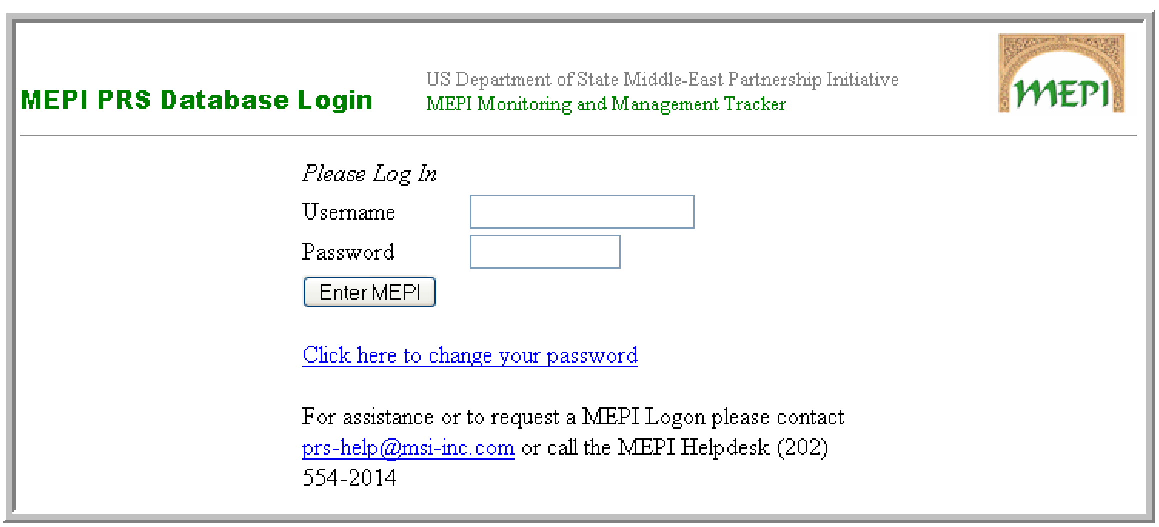
Logging On

Accessing the Performance Reporting System (PRS)

The PRS can be accessed from any internet browser by typing the following URL. (Note that there is no "www" in the URL).

http://mepinet.msi-inc.com/

Once the URL has been entered, a log-on screen will appear and the user can enter their user name and password.



Each implementer should contact the MEPI PRS Help Desk as soon as possible after award to request log-on IDs

In order to maintain system security and prevent unauthorized access to data, only authorized users are able to access the MEPI PRS. Each implementer should designate two authorized representatives who will receive Log-On IDs and be able to access the online system[†]. Implementers will only be able to view data related to their own projects.

Immediately after award, the implementer will receive an introductory package which includes both this Guide and contact information for the MEPI PRS Help Desk. The MEPI PRS Help Desk is in charge of issuing log-on IDs. Each implementer should contact the MEPI PRS Help Desk as soon as possible after award to request log-on IDs.

Contact Information for the MEPI PRS Help Desk is:

Email: PRS-Help@mepi.msi-inc.com
Telephone: 202-554-2014

If this Guide will be kept in a secure location, users may find it helpful to record their log-on ID below for easy access.

This is the Log-On ID for ______________________________

USER NAME: ______________________________

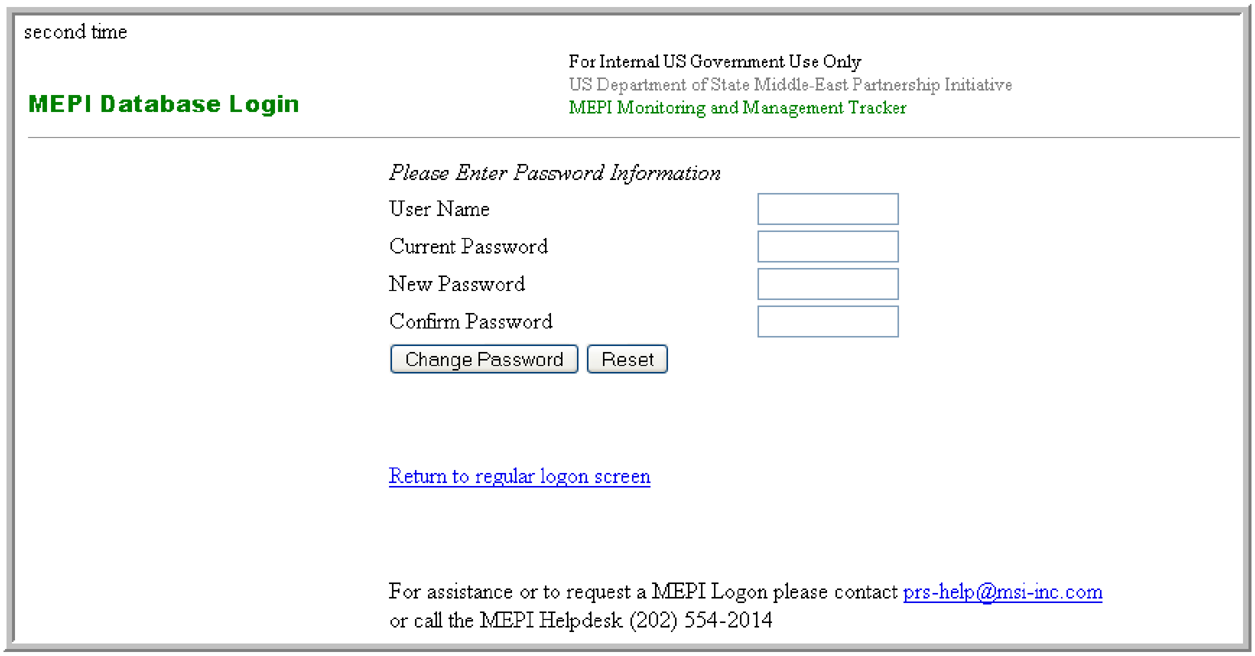
PASSWORD: ______________________________

Troubleshooting Log-Ons

If an implementer needs a new log-on due to staff reassignment or turnover, an email should be sent to the MEPI Project Officer providing contact information for the newly designated user and indicating which of the former user accounts should be deleted, and providing the name and email of the new user. The "Submit Request to MEPI" command on the implementer main menu can be used for such a request. The Project Officer will certify the request and then forward it to the MEPI PRS Help Desk which will issue a new log-on and delete the old one.

Implementers can change their password at any given time. However, if this change results in authorized users having problems accessing the PRS, then they should contact the MEPI PRS Help Desk who will reset their password.

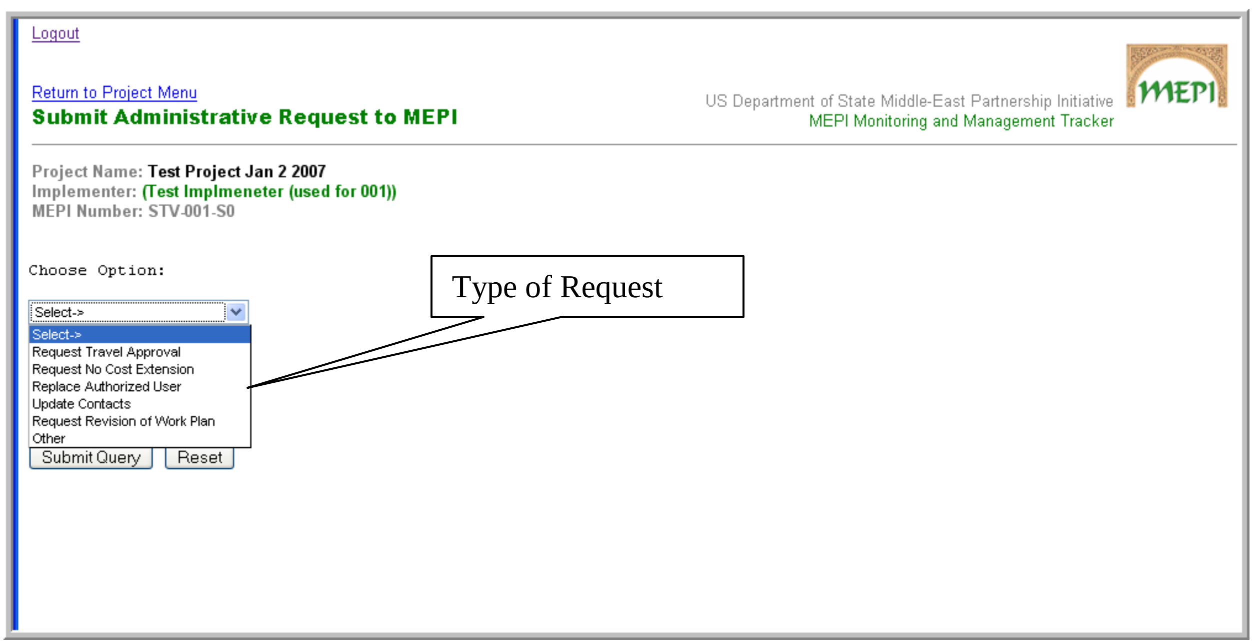
[†] Implementers may request more than 2 authorized users if necessary.



Notification Emails

The PRS includes an automatic email notification feature that notifies Project Officers of implementer submission of RMPs, workplans, and quarterly reports. Automatic emails also go out to implementers when RMPs, workplans, and quarterly reports are approved by MEPI.

Implementers can send administrative requests to MEPI through the PRS system as well.



NOTE: This automatic notification will be sent to the email addresses on file for the implementer's authorized users. These email addresses will be used for all automatic notifications generated by the PRS. Implementers are responsible for ensuring that these email addresses are accurate and up-to-date. The Submit Query command on the implementer main menu can be used to change or update the authorized users and their email addresses.

IV. Submission of Planning Documents (RMP and WP)

The two MEPI project planning documents are the Results Monitoring Plan (RMP) and the workplan (WP). Each of these documents is based on the project design outlined in the SoW. Once an award is made, the MEPI Project Officer will enter information from the SoW into the PRS to generate the online RMP and workplan templates for the implementer. The information that will be entered includes:

- Intended outcomes,
- Objectives, and
- Indicators, as well as
- Major activities and the
- Associated milestones[‡].

If implementers have any questions about the information that has been entered for their project, they should contact the Project Officer.

Implementers who received a MEPI award <u>prior to August 15, 2006</u> typically have SoWs that specify their project's intended outcomes and objectives using a different format and terminology than employed in the new standardized system. MEPI has taken steps to adapt earlier project terminology to the new system and upload that information to create customized workplan and RMP templates for these awards. If implementers have any concerns about the way in which their project SoW has been presented in the new system, they should contact their MEPI Project Officer. Please refer to p. ***Error! Bookmark not defined.*** *for additional instructions on transitioning to the*

When an implementer first accesses the PRS the MEPI-entered information will be displayed in project's RMP and workplan input screens. The implementer will add the required information to prepare the workplan and RMP for submission to MEPI. The implementer has 30 days from the date the Project Officer completes the RMP and workplan in the database to add required information.

Completing the Results Monitoring Plan (RMP)

The RMP is intended to provide MEPI Project Officers and implementer Project Managers with an understanding of how the implementer will collect data for the required performance indicators. A good RMP ensures that data will be collected in the same way each time so that results can be compared from one time period to the next. Analysis of the data collected should inform project management decisions over the life of the project and enable senior MEPI

[‡] *NOTE*: The outcomes, objectives and indicators listed in the award SoW may not be changed by the PO or implementer without authorization from the MEPI Planning Unit in consultation with the Grants Officer. If a change is approved, the MEPI Project Officer will enter it into the system.

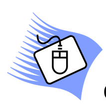
management to assess the value of its various interventions in achieving the broader USG reform goals in the country or region.

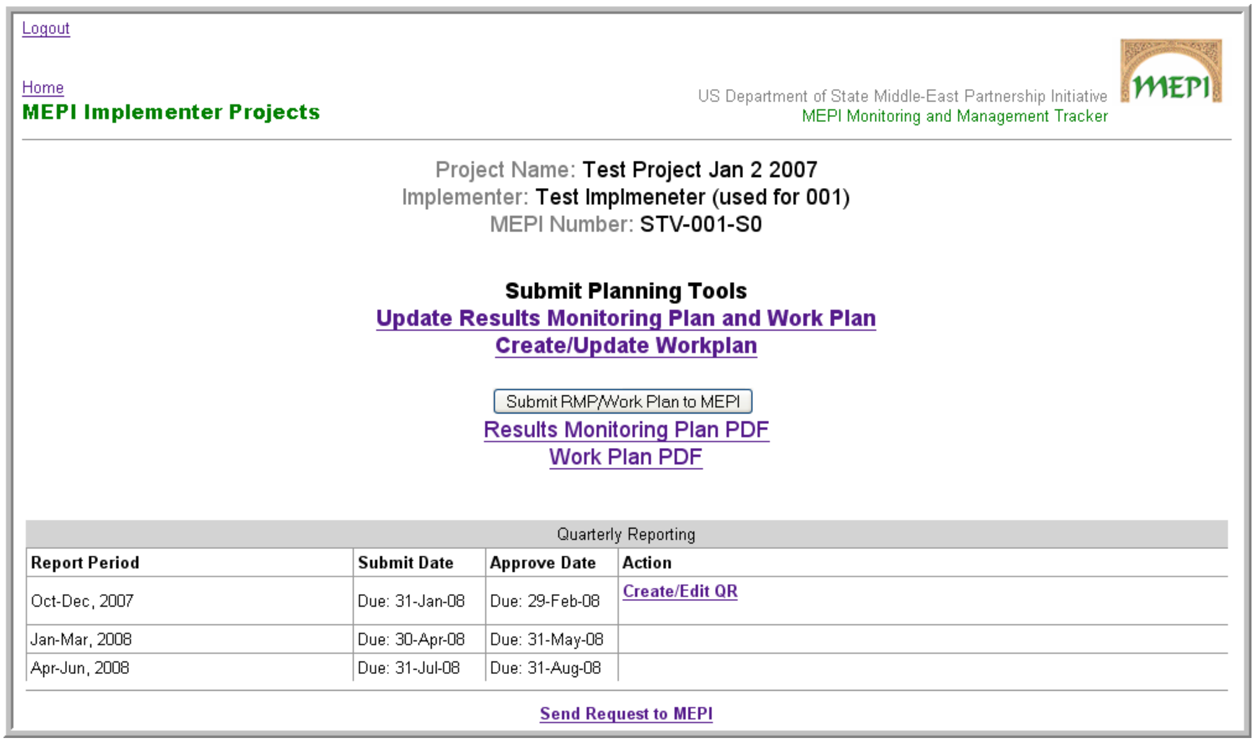
The completed RMP requires a full definition of each indicator to ensure that MEPI and the implementer have exactly the same understanding of the measures used to assess project results and the data being collected over the duration of the project are accurate and reliable. The RMP also details the measurement units that will be used and how the data will be collected for each of the indicators. The information required in the RMP for each indicator includes:

1. Indicator Definition
2. Baseline Date (when measurement begins)
3. Baseline Value (value of the indicator before the project begins; for example, if there are five community centers existing and an implementer wants to build more, then five is the baseline value.)
4. Target (not required for every indicator; discuss with a MEPI Program Officer)
5. Unit of Measure (number, percent, yes/no, etc.)
6. Reporting Frequency (how often the data will be reported—quarterly, yearly, etc.)
7. Data Source and Collection Method (data source is where the numbers come from—training registration forms, Ministry records, and so forth—while collection method is how the data will be collected and analyzed—surveys, indexes, etc.)
8. Person/Unit Responsible for Reporting
9. Comments/Concerns

These details help to ensure that data will be collected consistently and in the same manner from quarter to quarter, facilitating the task of data analysis. More detailed descriptions of these elements, including examples, are provided below.

Entering Results Monitoring Plan Information

To access the RMP,  click on the "Update Results Monitoring Plan Detail" command on the implementer's main menu.



Logout

Home

MEPI Implementer Projects

US Department of State Middle-East Partnership Initiative
MEPI Monitoring and Management Tracker

Project Name: **Test Project Jan 2 2007**
Implementer: **Test Implmeneter (used for 001)**
MEPI Number: **STV-001-S0**

Submit Planning Tools
Update Results Monitoring Plan and Work Plan
Create/Update Workplan

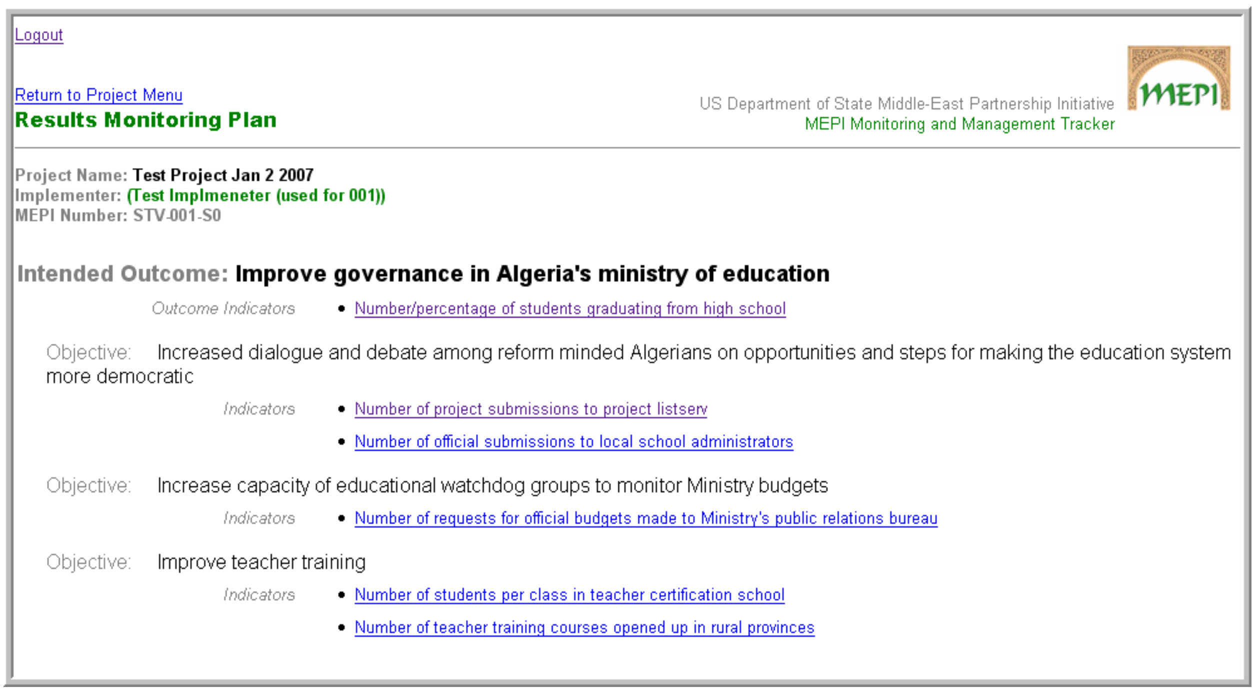
Submit RMP/Work Plan to MEPI
Results Monitoring Plan PDF
Work Plan PDF

Quarterly Reporting

Report Period	Submit Date	Approve Date	Action
Oct-Dec, 2007	Due: 31-Jan-08	Due: 29-Feb-08	Create/Edit QR
Jan-Mar, 2008	Due: 30-Apr-08	Due: 31-May-08	
Apr-Jun, 2008	Due: 31-Jul-08	Due: 31-Aug-08	

Send Request to MEPI

The RMP screen displays the project's intended objectives and objectives along with the respective performance indicators as entered by the MEPI Project Officer, based on the approved project SoW.



Logout

Return to Project Menu

Results Monitoring Plan

US Department of State Middle-East Partnership Initiative
MEPI Monitoring and Management Tracker

Project Name: **Test Project Jan 2 2007**
Implementer: **(Test Implmeneter (used for 001))**
MEPI Number: STV-001-S0

Intended Outcome: Improve governance in Algeria's ministry of education

Outcome Indicators
- Number/percentage of students graduating from high school

Objective: Increased dialogue and debate among reform minded Algerians on opportunities and steps for making the education system more democratic

Indicators
- Number of project submissions to project listserv
- Number of official submissions to local school administrators

Objective: Increase capacity of educational watchdog groups to monitor Ministry budgets

Indicators
- Number of requests for official budgets made to Ministry's public relations bureau

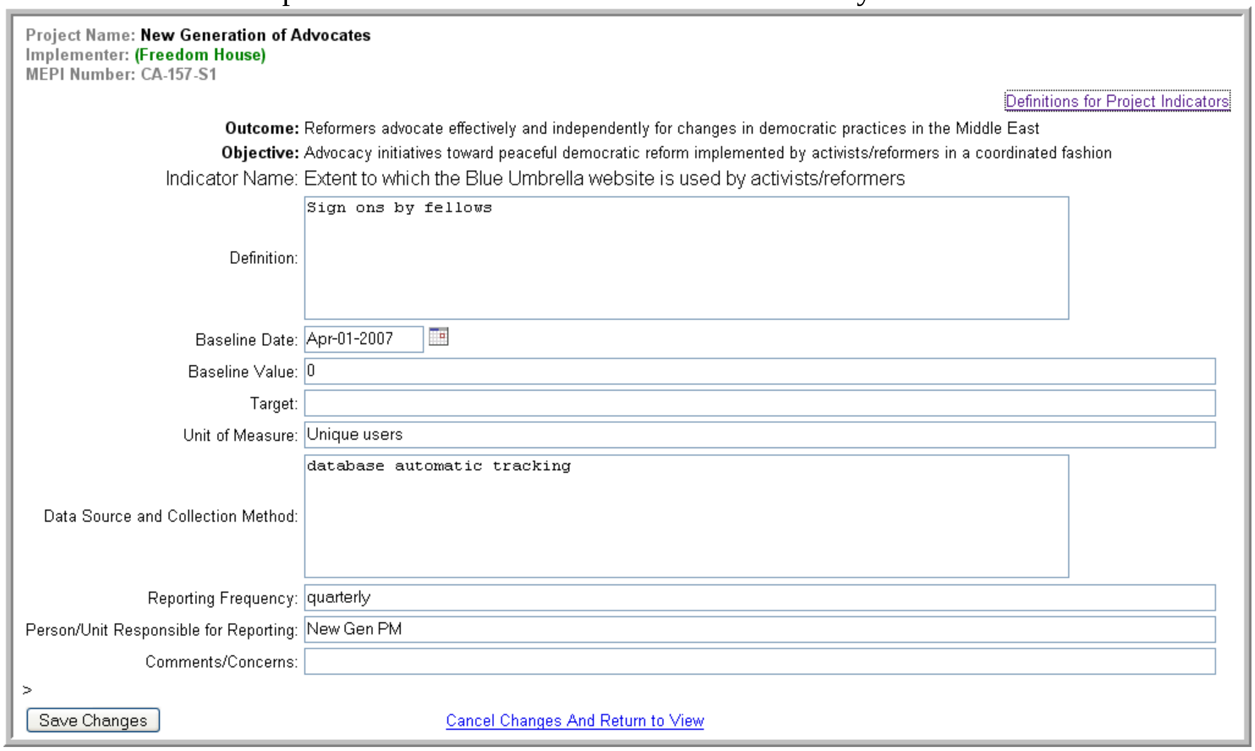
Objective: Improve teacher training

Indicators
- Number of students per class in teacher certification school
- Number of teacher training courses opened up in rural provinces

Each indicator listed in the RMP is hyperlinked to an indicator input screen where the user will enter the additional information required to complete the RMP.

Click on the indicator to navigate to its “Edit MEPI Indicator” screen. Each indicator screen will show several categories to be filled out, such as definitions, descriptions of how the data will be collected, responsibility for data collection, and baseline information. To the upper right is a link titled “Definitions for Project Indicators,” which provides instructions for each of the categories.

To complete the indicator information, click on each field in sequence. When working with the screen the implementer can either click or use the Tab key to move the next field.


Project Name: **New Generation of Advocates**
Implementer: **(Freedom House)**
MEPI Number: CA-157-S1

Definitions for Project Indicators

Outcome:	Reformers advocate effectively and independently for changes in democratic practices in the Middle East
Objective:	Advocacy initiatives toward peaceful democratic reform implemented by activists/reformers in a coordinated fashion
Indicator Name:	Extent to which the Blue Umbrella website is used by activists/reformers
Definition:	Sign ons by fellows
Baseline Date:	Apr-01-2007
Baseline Value:	0
Target:	
Unit of Measure:	Unique users
Data Source and Collection Method:	database automatic tracking
Reporting Frequency:	quarterly
Person/Unit Responsible for Reporting:	New Gen PM
Comments/Concerns:	

>

Save Changes Cancel Changes And Return to View

When finished entering information into the various fields, click the Save Changes button in the lower left of the screen.

Notice the link labeled “Definitions for Project Indicators” at the top right of the screen. Clicking on this link leads to a popup window explaining what to enter into the various categories. Descriptions of each of the required RMP elements are provided below.

Table 1: Results Monitoring Plan Fields

Field Name	Type (maximum character length)	Notes
INFORMATION FROM THE SoW		
Intended Outcome	Locked data entered by PO	
Objective	Locked data entered by PO	
Indicator Name	Locked data entered by PO	
INDICATOR INFORMATION TO BE ADDED BY THE IMPLEMENTER		
Definition	Text- no limit	Precise definition of any unclear terms included in indicator name
Baseline Date	Date	Date at which baseline is taken
Baseline Value	Text (250 characters)	Value of indicator before project begins
Target	Text (150 characters)	Any target numbers (NOT required; talk with your MEPI Program Officer about whether a specific indicator should have targets.)
Unit of Measure	Text (50 characters)	Unit of measurement (number, percent,y/n)
Data Source and Collection Method	Text- no limit	Source of the data and how the data will be collected/analyzed
Reporting Frequency	Text (50 characters)	Frequency of Data Reporting (quarterly, yearly, etc.)
Person/Unit Responsible for Reporting	Text (200 characters)	Who is responsible for reporting
Comments/Concerns	Text (500 characters)	Other issues not covered in the above categories

Description of Key Elements in the Results Monitoring Plan

Performance Indicator

Indicators are measures used to gauge progress toward the project's intended outcomes and objectives. The indicators listed in the RMP template have been copied directly from the SoW and cannot be changed by the implementer without MEPI approval.

Definition

Under "Definition," describe all the key terms in the indicator, so that you and MEPI can understand precisely what will be counted as a success and what will not. If percentages or ratios are to be used, identify precisely the numerator and the denominator to be used in calculating the number. For qualitative indicators, give as complete and precise a definition of the conditions that will represent a "yes" or "no" in a yes/no type of indicator, or be observed and judged to represent achievement or stages of progress toward achievement of the Outcome or Objective in that type of indicator. If using a scorecard, milestone scale, index, or other similar tool, reference the tool you will use. That tool should be discussed and agreed upon with the MEPI program officer, and provided as an attachment to the Statement of Work.

Baseline Date and Baseline Value

Under "Baseline Date" and "Baseline Value," identify the date when actual baseline data were collected, and the value. The baseline is the initial measurement of an indicator at the start of the project. For example, a project that aims to increase the number of local firms exporting to the United States should measure the number of such firms at the beginning of the project, in order to measure progress over the course of the project. For quantitative indicators, the number/percentage/etc. noted under "Unit of Measure" should be stated. Often baseline is zero and, if so, "0" should be entered. For qualitative indicators, the baseline conditions should be described (per the terms provided in the Indicator Definition).

Ideally, the baseline data can be collected or acquired from a secondary source (such as a ministry) for a period as close to the beginning of the project as possible, in order to get a clear picture of the status of the Outcome or Objective indicator before the project's interventions. If no pre-project baseline data are available, they should be collected as soon after the start of the project as possible.

Target

Under "Target," place the expected value you hope to reach, and by when you hope to reach it by. **For some indicators, it may not be advisable to have a target; this should be determined in consultation with MEPI.** If no target is used, enter "n/a." The target value may be a final number (i.e. 100 judges trained, a rating of 4.5 on an agreed-upon index, etc.) There may also be intermediate targets (i.e. 30 judges trained after six months, 60 judges trained after one year).

Unit of Measure

Under "Unit of Measure," identify the unit used (number of firms, percent, yes/no, dollars, index score, average, etc.) Using number and percent together is recommended where possible. If five local firms are exporting to the United States, that may be very significant if there are only ten local firms, but relatively insignificant if there are 300 local firms. Providing information such as "5 firms/25% of total firms" gives a good picture of program impact, on an absolute and relative level.

Reporting Frequency

Under "Reporting Frequency," identify how often the data will be reported (e.g., quarterly, yearly, etc.)

Data Source and Collection Method

Under "Data Source and Collection Method," identify the source of the data to be collected and used to calculate the value of a quantitative indicator (e.g., the Ministry of ___ records, training registration forms, records completed by project staff, a survey of activists) or to decide whether a qualitative condition has or has not been achieved (e.g., direct observations made by project staff, self-reported conditions by assisted NGOs).

Also identify how the data will be collected and analyzed. If using a survey, who will be surveyed? How will the survey be conducted? If using an index, what will be evaluated? How will the scores be compiled? Again, if using an index, baseline scorecard, or similar tool, that tool should be referenced here after being discussed and agreed upon with a MEPI program officer (and attached to the Statement of Work). This information is critically important for data collectors, so if someone leaves the project, their replacement will be able to read this information and know exactly what to do. It is also important for any new program or grants officers in MEPI.

Person/Unit Responsible for Reporting

Under "Person/Unit Responsible for Reporting," identify who is specifically responsible for data reporting for the Quarterly Report.

Comments/Concerns

Under "Comments/Concerns," identify anything worth noting that has not already been identified.

Here is an example of a properly filled-out RMP detail section.

Indicator: #/% of targeted CSOs that report they can obtain needed information from key public agencies	
Definition: Targeted CSOs = CSOs who are registered partners with our project. 50 CSOs expected to participate. Needed information = rules for registration, activity permits, contact information, and other information pertinent to operating a CSO. Key public agencies = Ministry of Interior, provincial government, municipal governments, police	
Baseline Date: January 1, 2007 **Baseline Value:** 5 CSOs/10% at January 31, 2007	**Target:** 12 CSOs/ 25% by the end of 2007, 30 CSOs/60% by the end of 2008
Unit of Measure: number and percent of targeted CSOs	
Reporting Frequency: Quarterly	
Data Source and Collection Method: Quarterly survey of all leaders of targeted CSOs. Survey will be via telephone asking questions from a standard form.	
Person/Unit Responsible for Reporting: Data will be analyzed and reported on by Jane Roe.	
Comments/Concerns: 12 CSOs do not currently have telephones. We will have to survey them in person or via mail. Also, two CSOs currently have no directors, so we will have to survey chief officers instead.	

Saving or Submitting the Completed Results Monitoring Plan

Once the data are entered into the indicator screens as discussed above, the implementer will click the "Submit to MEPI" button to load the RMP information into the database. Clicking on the submit button will automatically notify the PO that the RMP is ready for MEPI review and approval. The MEPI PO has 14 days to approve the RMP. Once the RMP has been approved by MEPI, an automatic email notice will be generated by the PRS and sent to the two authorized implementer users. After approval by MEPI, the indicator information will be locked and may no longer be modified by the implementer except by special request. The menu command for submitting the RMP will no longer appear on the implementer's main menu, unless reactivated by MEPI.

NOTE: The automatic notification of RMP approval will be sent to the email addresses on file for the implementer's two authorized users. These email addresses will be used for all automatic notifications generated by the PRS. Implementers are responsible for ensuring that these email addresses are accurate and up-to-date. The "Submit Request to MEPI" command on the implementer main menu can be used to change or update the authorized users and their email addresses.

If the implementer prefers to save the information entered without submitting it to MEPI, the "Save without Submitting" button can be used. This allows the implementer to complete the RMP over several work sessions, and to review the information prior to submission to MEPI.

The implementer can create a printed copy of the information that has been entered into the RMP at any point in the process by using the print command on their internet browser.

NOTE: It is critical that the implementer either save or submit the information entered BEFORE leaving the RMP section of the PRS. If neither button is clicked, the information entered will be lost.

NOTE: As noted earlier, the RMP should be completed and submitted by the implementer within 30 days from the date of email notification by the PO that the SoW information has been entered in the PRS.

Revision of the Results Monitoring Plan

Progress towards achieving project results is measured through performance data recorded each quarter for the project's indicators using the PRS quarterly report function. As noted earlier, the RMP cannot be modified without MEPI approval.[§] If the implementer wishes to change any of the information contained in the RMP, a specific request must be made to the PO via email. If the change is approved by MEPI, the PO will make the requested changes. Once entered, the PO

[§] Note that changes to the indicators listed in the SoW will likely require an award amendment; changes to RMP details pertaining to how that indicator will be measured can be approved more easily by MEPI, but are not encouraged due to a desire to maintain data comparability over time.

Approval will trigger an automatic email notification to the two authorized implementer representatives and to the Grants Officer.

Completing the Project Workplan

The purpose of the MEPI workplan is to identify, describe, and schedule the specific actions that will lead to accomplishment of the objectives and intended outcome(s) of the project. More specifically, the workplan:

- Reflects a shared understanding of project activities, and the schedule for these activities
- Is generated by the implementer based on the objectives, major activities, and milestones listed in the SoW.
- Functions as an overall management tool for the implementer, and as a means for MEPI to track progress on project implementation.
- Allows MEPI to identify and track public events likely to generate media coverage which the Embassy and MEPI should be aware of in advance.
- Allows MEPI to designate certain activities as "critical deadlines" crucial to project success.

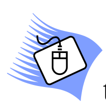
The workplan is organized by objective and should include all key activities required to reach each objective. The level of detail should be adequate to give MEPI a picture of the main steps the implementer will undertake to achieve each objective. In some cases, adequate detail may have been provided already in the SoW.

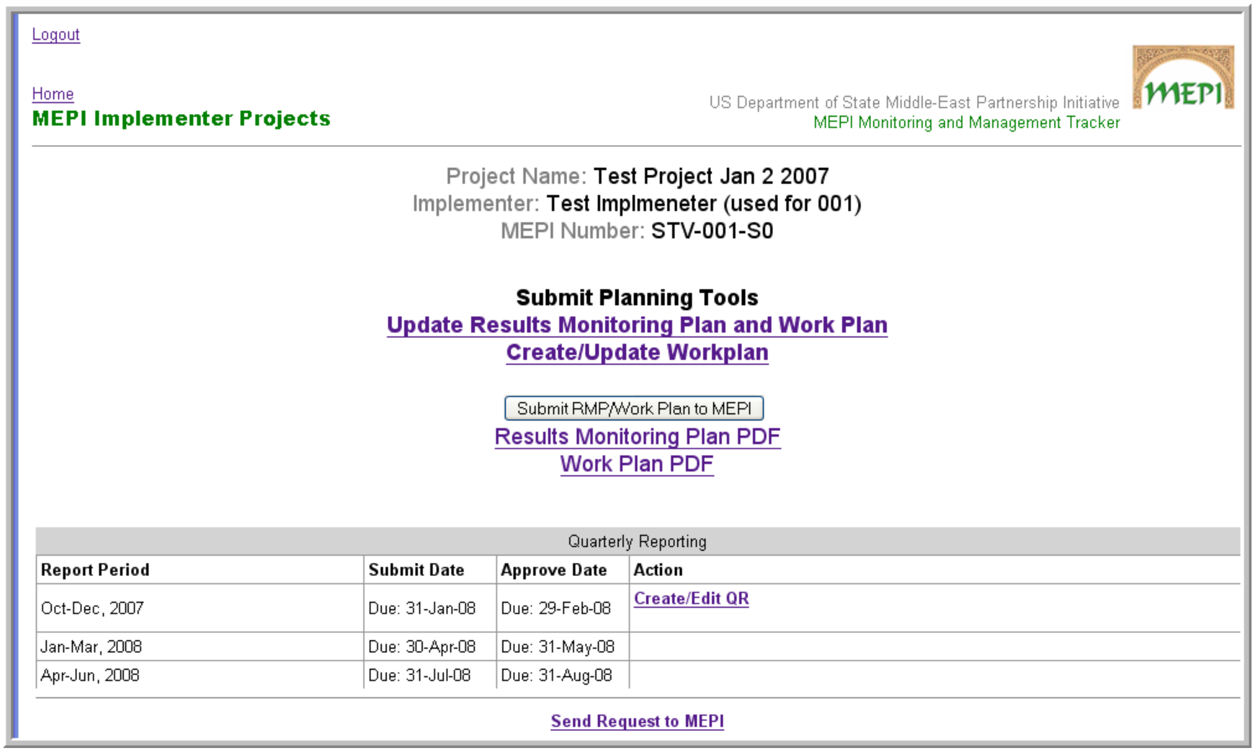
The completed workplan includes:

1. The key activities necessary to achieve each project objective
2. Planned activity completion dates (milestones)

The project workplan is to be completed and submitted by the implementer not more than 30 days after email notification from the PO that the SoW information from the award has been entered into the PRS. MEPI approval of the workplan is required.

Entering Workplan Information

To complete the workplan,  the implementer should click on the "Update Results Monitoring Plan and Work Plan" command on the MEPI home page to navigate to the Project RMP framework page.



Logout

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Implementer: **Test Implmeneter (used for 001)**
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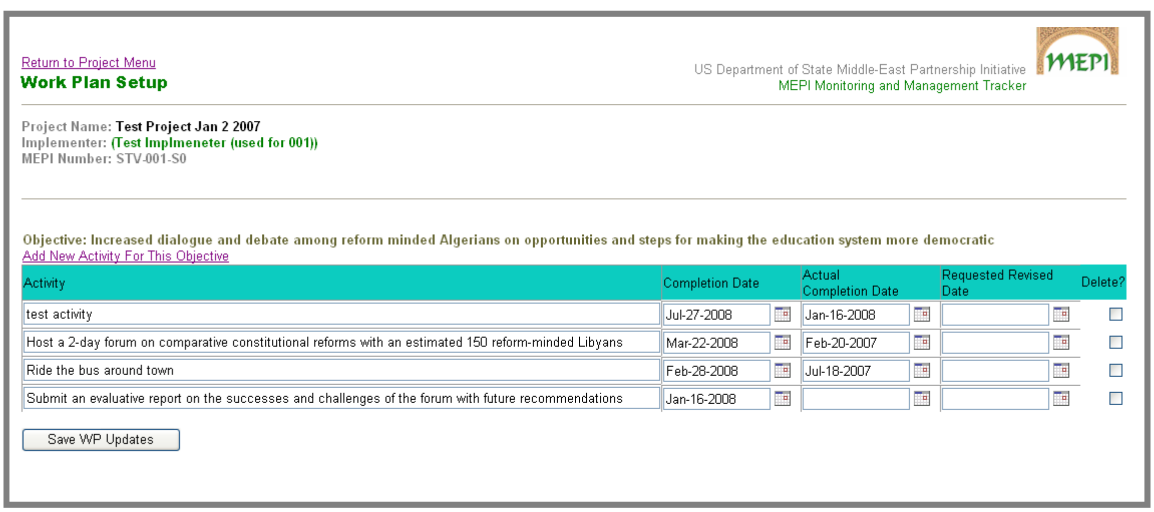
Apr-Jun, 2008	Due: 31-Jul-08	Due: 31-Aug-08	

Send Request to MEPI

During the Work Plan set up, the implementer has full editing range of the work plan activities and initial planned completion dates. Users should enter information by clicking on the fields on the screen, or using the Tab key to move the next input field.



Return to Project Menu

Work Plan Setup

US Department of State Middle-East Partnership Initiative
MEPI Monitoring and Management Tracker

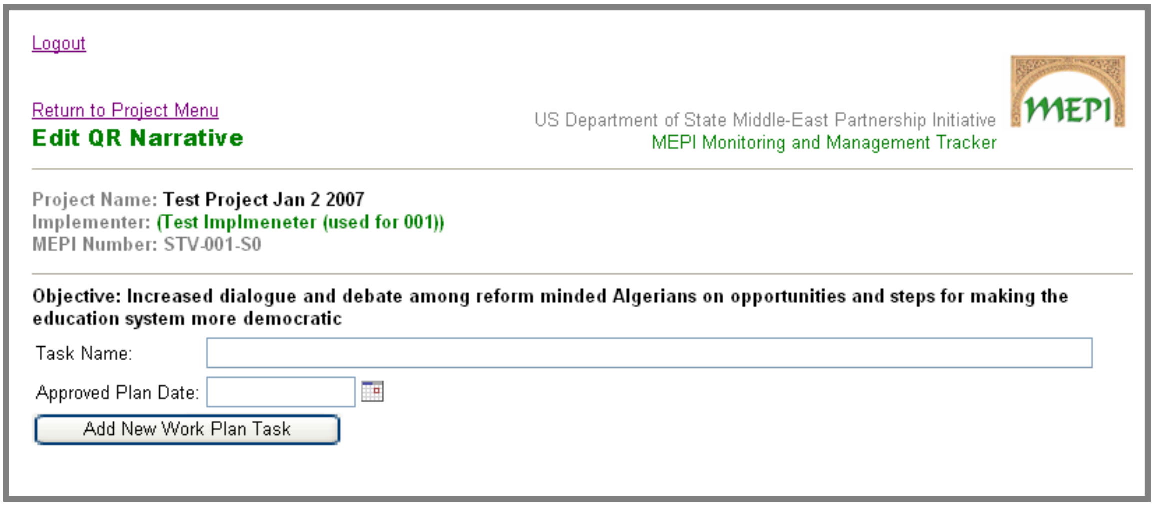
Project Name: **Test Project Jan 2 2007**
Implementer: **(Test Implmeneter (used for 001))**
MEPI Number: STV-001-S0

Objective: Increased dialogue and debate among reform minded Algerians on opportunities and steps for making the education system more democratic
Add New Activity For This Objective

Activity	Completion Date	Actual Completion Date	Requested Revised Date	Delete?
test activity	Jul-27-2008	Jan-16-2008		
Host a 2-day forum on comparative constitutional reforms with an estimated 150 reform-minded Libyans	Mar-22-2008	Feb-20-2007		
Ride the bus around town	Feb-28-2008	Jul-18-2007		
Submit an evaluative report on the successes and challenges of the forum with future recommendations	Jan-16-2008			

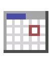
Save WP Updates

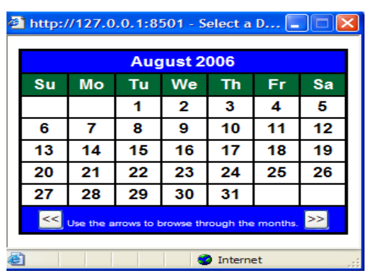
To add a new activity to this Objective's workplan, the user should click on the "Add New Activity for this Objective" link above and to the left of the activity table.



Date Entries in the PRS

All dates in the MEPI Database will be display in the “DD-MMM-YY” format (examples: 01-Apr-05, 28-Oct-06). When updating or adding dates in the edit forms, the user should always use the “Calendar Wizard” by clicking on the wizard icon.

 Clicking the icon activates a pop-up box that allows the user to select the desired date.



This will ensure standardized date formats by both US-based and locally-based implementers. Correct date entry is critical to many database functions.

Descriptions of each workplan element are provided below.

Table 2: Workplan Fields

Field Name	Type	Notes
Activity	Text	Name of the implementation activity
Planned Completion Date	Date	Implementer should enter planned completion date for activity
Actual	Date	Implementer enters this field as part of QR process

Description of Key Elements in the Workplan

Key Project Activities

The implementer should enter all key activities required to achieve each objective. The final list of activities should include each significant step the implementer will undertake to achieve each objective. Only enough detail should be presented so that MEPI can be assured that the implementer has thought through the necessary key steps.

The implementer's knowledge of the country and technical expertise relating to the project objective(s) will assist in defining the type and sequence of activities needed to reach the objective. It is helpful to work backwards from the project end date and assign target completion dates to the sequence of activities in a way that ensures project objectives can be completed by project close. Some questions that the implementer may want to keep in mind in identifying activities and timeframes are:

- Have you carefully considered and documented how long each activity will take?
- Do any activities need to take place on a set schedule or at a particular time of the year?
- Do one or more activities need to be carried out in a particular order?
- Does a minimum or maximum amount of time need to take place between any two activities?
- Are any activities dependent on the completion of other activities, and how will this affect planning?

If useful, both the start and end of an activity can be listed with the relevant dates (e.g., "training program curriculum designed" as a start activity and "training program conducted" as an end activity). For some activities the implementer will find it appropriate only to enter an end date.

Where related to more than one objective, an activity should be listed under the one objective with which it is most closely associated.

Planned Completion Dates

For each listed activity, the implementer should indicate the planned completion date. Dates for major activities listed in the SoW will already have been entered into the workplan and cannot be altered by the implementer without MEPI concurrence.

Public Events

Certain objectives, milestones and activities are, by their nature, "Public Events." These are circumstances where MEPI activities are in the public eye, and which need to be flagged for MEPI Public Affairs staff and other State Department offices. Examples of these events include kickoff events for awareness campaigns, conferences, and other activities likely to generate media coverage in the host country. As implementers develop the project workplan they should communicate with MEPI to identify activities that MEPI may want to designate as public events. Similarly, the implementer should be aware of which (if any) of project's activities MEPI designates as public events and be aware that those are being tracked as such by MEPI and other State Department staff.

When creating the workplan, implementers should make preliminary designation of certain activities as public events as a way to direct MEPI's attention to appropriate candidates for such designation. After reviewing the workplan, MEPI will make final designation of public events so they can be added to the MEPI calendar and tracked by the relevant Embassy and State Department officials.

Critical Deadlines

Activities with "Critical Deadlines" are often those which have a planned interaction with timeframes external to the project. For example, the host country government might be sponsoring a broad participatory conference on judicial reform and the grantee intends to present a particular body of research at the conference. Clearly, if the project is late in producing the research, its value is largely eliminated. In this instance, the planned completion date for the research report might well be deemed a critical deadline. The workplan dates for other activities necessary for the completion of the research report, such as conducting research, writing up the draft report, and having it reviewed, are also critical deadlines for success since they lie on the critical path leading to the completion of the report. Other related project activities such as sharing the same research results with other local NGOs might be considered to have independent timeframes and thus not be part of that critical path, even though they are a related activity.

Another example where critical deadline designation might also be applied is where the implementer's contribution is linked to the institutional calendar of the host country. For example, if it is agreed in the award that a textbook supplement is to be available for the beginning of the 2007 school year, the completion dates for the related activities could be designated critical deadlines.

In a process similar to that for designating public events, when creating their workplan, implementers are encouraged to make preliminary designation of certain activities as having "Critical Deadlines" as a way to direct MEPI's attention to appropriate candidates for such designation. After reviewing the workplan, MEPI will make final designation of critical deadlines so they can be added to the MEPI calendar. Activities with this designation will be tracked with greater attention by MEPI to ensure the project remains on track.

Saving or Submitting the Completed Workplan

Once the data are entered into the workplan the user will click the "Submit to MEPI" button to load the workplan into the PRS. Clicking on the submit button will automatically notify the PO that the workplan is ready for MEPI review and approval. The MEPI Project Officer has 14 days to approve the workplan. Once the workplan has been approved by MEPI, an automatic email will be generated by the PRS, notifying the two authorized implementer contacts of the approval. After approval, the workplan information will be locked and may no longer be modified by the implementer except as described below. The menu command for submitting the workplan will no longer appear on the implementer's main menu, unless reactivated by MEPI.

NOTE: The automatic notification of workplan approval will be sent to the email addresses on file for the implementer's two authorized users. These email addresses will be used for all automatic notifications generated by the PRS. Implementers are responsible for ensuring that these email addresses are accurate and up-to-date. The "Submit Request to MEPI" command on the implementer main menu can be used to change or update the authorized users and their email addresses.

If the implementer prefers to save the information entered without submitting it to MEPI, the "Save without Submitting" button should be used. This allows the implementer to complete the workplan over several work sessions, and to review the information prior to submission to MEPI.

The implementer can create a printed copy of the information that has been entered into the workplan at any point in the process by using the print command on their internet browser.

NOTE: It is critical that the implementer either save or submit the information entered BEFORE leaving the workplan section of the PRS. If neither button is clicked, the information entered will be lost.

NOTE: The workplan is to be completed and submitted by the implementer not more than 30 days after email notification from the PO that SoW information has been entered in the PRS. MEPI approval of the workplan is required.

Revision of Workplan

Development of the workplan should be undertaken with sufficient rigor and consultation with MEPI to minimize the need for subsequent change. However if it becomes apparent after implementation begins that a modification of the workplan is required, such changes are possible with MEPI approval. There are two mechanisms for requesting MEPI approval:

1) Approval for changes to the ***planned completion date of an existing approved activity*** can be requested as part of the routine submission of the quarterly report.

   The section of the quarterly report in which implementers report actual completion dates for activities also offers the option of requesting approval for a new completion date for an approved activity. See p. 24 in the "Submitting Quarterly Report" section for further details. Note that milestone dates for major activities listed in the SoW cannot be modified in this manner.

2) Approval for workplan changes that involve ***adding or deleting an activity***, or making ***any change to one of the major activities listed in the SoW*** requires a separate formal request to MEPI.

   The "Submit Administrative Request to MEPI" command on the implementer main menu should be used to transmit a detailed, well-substantiated request to MEPI seeking permission for the desired change. If approved by MEPI, the PO will make the changes in the PRS. MEPI approval will trigger an automatic email notification to the implementer's two authorized users.

V. Submission of Quarterly Report

By providing a concise, standardized template for quarterly reports, the PRS streamlines the reporting process. MEPI quarterly reports are submitted by implementers and approved by MEPI according to the following schedule.

QR Submission and Approval Dates

Reporting Period	QR Submission Date	MEPI Approval Date
October-December	January 31	February 28
January-March	April 30	May 31
April-June	July 31	August 31
July-September	October 31	November 30

Quarterly Report Elements

The quarterly report has four sections:

1. Overall Assessment (implementer self-assessment of progress) including an Executive Summary
2. Workplan Progress
3. Results Indicator Data
4. Brief Narrative Sections

The PRS automatically customizes each implementer's QR template so that the approved indicators and workplan activities are listed in the QR template. Brief descriptions of each section of the quarterly report follow.

1) Overall Assessment

In each quarter, implementers are asked to rate their project progress in two areas: a) anticipated results and b) workplan implementation. There are three possible ratings:

1. Ahead of schedule
2. On schedule
3. Behind schedule

These self-ratings should be supported by, and congruent with, the data presented in the rest of the QR on results indicators, workplan progress and in the narrative statements.

For the Executive Summary of Activities, please include a brief summary of major activities during this period, including delays or obstacles encountered and plans to address them. Also include a brief summary of program outcomes and objectives, including those not on target or exceeding expectations.

2) Workplan Progress

The second component of the QR lists the project's approved workplan activities and target dates, providing data fields for the implementer to enter the dates activities were actually completed. As with the indicator data, there is space in the narrative sections at the bottom of each workplan table to provide explanation for activities that are ahead of, or behind, schedule.

MEPI recognizes that the Middle East can sometimes be a volatile region to work in, and that extenuating circumstances (government non-cooperation, security concerns, and so forth) can hold up progress on the workplan. Such circumstances are beyond implementer control, and MEPI wants to work with implementers experiencing these difficulties rather than penalize them. Implementers are encouraged to describe any such obstacles to progress in their reporting.

The workplan progress section also gives implementers the opportunity to request MEPI approval to change target dates for those activities not listed in the SoW.

3) Results Indicator Data

The third section of the QR template lists the project's indicators and provides data fields for reporting against them. Baseline data and data reported on previous QRs are also shown to facilitate comparisons. Each indicator comes with a narrative section which, as with the narrative sections for workplan progress, provide opportunity for implementers to explain performance that significantly exceeds or fails to meet expectations. Again, MEPI encourages implementers to openly report any obstacles they may encounter. MEPI will not penalize implementers for circumstances beyond their control.

4) Narrative Sections

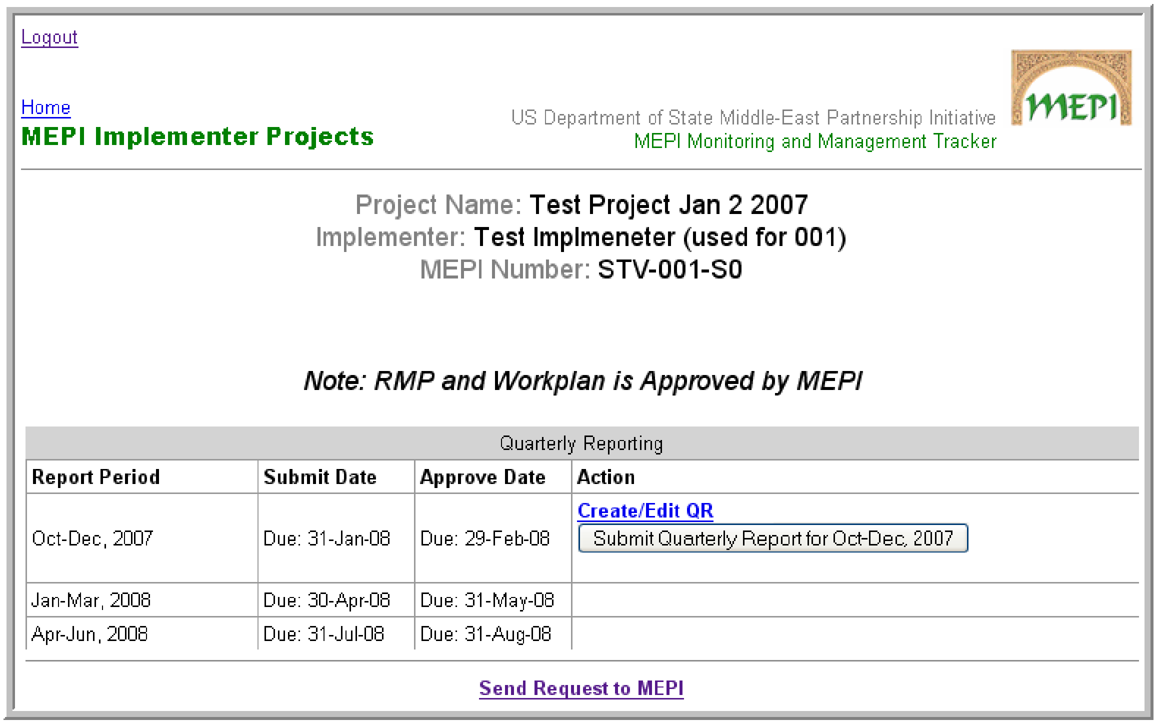
The fourth component of the QR includes four narrative boxes or input fields, each with a specific topic.

1. Purpose, Activities and Outcomes of Any Visits
2. Outreach or Media Contacts during the Period
3. Discussion of Projected Activities for Next Quarter
4. List of appendices (if any).

Entering Quarterly Report Data

Implementers can begin to enter data into their online QR form as early in the quarter as they wish. The next quarter's form becomes accessible as soon as the previous QR is approved.

To access the QR submission screen, click "Create/Edit QR" from the implementer main menu and the QR interface will appear.


Logout

Home

MEPI Implementer Projects

US Department of State Middle-East Partnership Initiative
MEPI Monitoring and Management Tracker

Project Name: **Test Project Jan 2 2007**
Implementer: **Test Implmeneter (used for 001)**
MEPI Number: **STV-001-S0**

Note: RMP and Workplan is Approved by MEPI

Quarterly Reporting			
Report Period	**Submit Date**	**Approve Date**	**Action**
Oct-Dec, 2007	Due: 31-Jan-08	Due: 29-Feb-08	**Create/Edit QR** Submit Quarterly Report for Oct-Dec, 2007
Jan-Mar, 2008	Due: 30-Apr-08	Due: 31-May-08	
Apr-Jun, 2008	Due: 31-Jul-08	Due: 31-Aug-08	

Send Request to MEPI

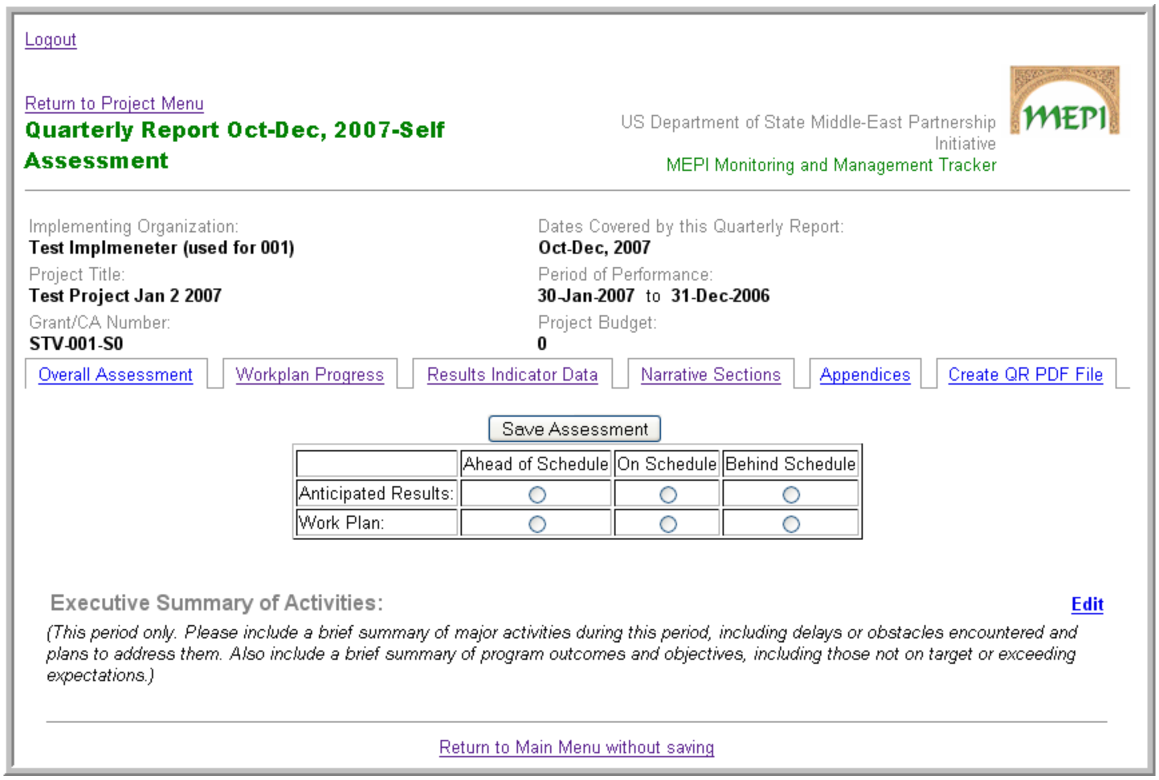
Information can be entered in the four QR components in any order the implementer wishes. If desired, information can be entered and saved without submitting it to MEPI. This allows the implementer to enter some of that quarter's information, save it and then come back and enter the remaining data at another time. Saved data can also be modified prior to being submitted.

To facilitate review, at any time during the process, the implementer can print a copy of the QR and the data entered using the "print" command on their internet browser. It is advisable to print a copy immediately prior to submission in order to maintain a record of each report.

Entering Data in Each Section

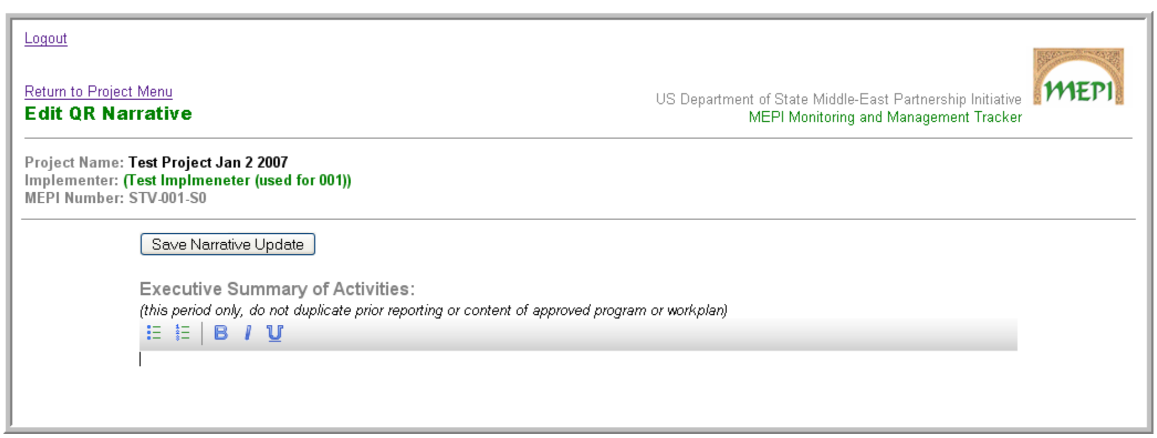
Overall Assessment

To enter the project's overall assessment, click on the Overall Assessment tab to access that section of the QR. Click on the button next to the rating that best matches the project's overall assessment of its progress in each of the two areas. Only one rating for each area can be selected. The QR cannot be submitted unless a rating has been selected for each category.



Clicking on the "Edit" link will lead to the Executive Summary of Activities. In this field implementers provide a brief executive summary of the project's progress during the quarter. The narrative should focus on the current period only and not duplicate prior reporting or the content of the approved SoW or workplan. The executive summary should be as succinct as possible, while ensuring that the main highlights of progress are covered. The summary is widely shared within MEPI and may be part of the information available in special reports provided to senior managers at MEPI and in the State Department.

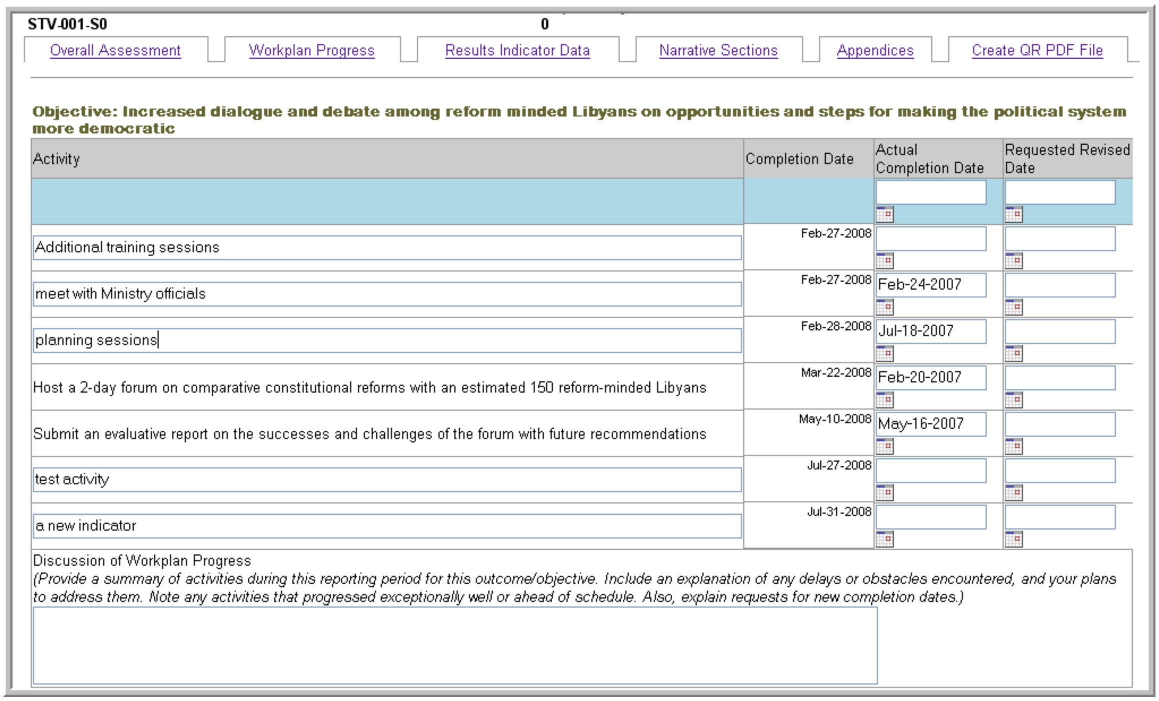
Once finished entering information into the Ecexutive Summary, click the "Save Narrative Update" button to saved your work and return to the Overall Assessment screen.



Workplan Progress

To enter data on workplan progress, the implementer clicks on the "Workplan Progress" tab on the QR screen. Each activity and associated target date included in the approved workplan will appear, along with any information on actual completion dates already entered as part of previous QRs. The user should enter actual completion dates for any activities completed during the quarter.

The Discussion of Workplan Progress section at the bottom of each outcome/objective calendar allows implementers to provide a narrative summary of activities during the reporting period in question. Implementers should include an explanation of any delays or obstacles encountered, and your plans to address them. Implementers should also note any activities that progressed exceptionally well, and explain requests for new completion dates.


STV-001-S0 0

Overall Assessment | Workplan Progress | Results Indicator Data | Narrative Sections | Appendices | Create QR PDF File

Objective: Increased dialogue and debate among reform minded Libyans on opportunities and steps for making the political system more democratic

Activity	Completion Date	Actual Completion Date	Requested Revised Date
Additional training sessions	Feb-27-2008		
meet with Ministry officials	Feb-27-2008	Feb-24-2007	
planning sessions	Feb-28-2008	Jul-18-2007	
Host a 2-day forum on comparative constitutional reforms with an estimated 150 reform-minded Libyans	Mar-22-2008	Feb-20-2007	
Submit an evaluative report on the successes and challenges of the forum with future recommendations	May-10-2008	May-16-2007	
test activity	Jul-27-2008		
a new indicator	Jul-31-2008		

Discussion of Workplan Progress
(Provide a summary of activities during this reporting period for this outcome/objective. Include an explanation of any delays or obstacles encountered, and your plans to address them. Note any activities that progressed exceptionally well or ahead of schedule. Also, explain requests for new completion dates.)

Requesting Changes to Target Completion Dates

Over the course of project implementation, some changes to estimated workplan dates may be required. The implementer can request changes to the workplan dates using the "Requested Revision" column of the "Workplan Progress" section of the quarterly report.

NOTE**:** As stated earlier, in order to change approved workplan activities themselves, or dates associated with the major activities that were listed in the SoW, the implementer must request special MEPI authorization using the "Request Revision of Workplan" email in the "Send Request to MEPI" dropdown menu. Only changes to target completion dates can be requested via the QR, and only for activities not listed in the SoW.

The requested date changes are reviewed by the PO as part of the review and approval of the QR. If the PO approves the revisions, they will be saved to the PRS when the PO approves the QR. In future QRs the revised dates will appear in the quarterly report template so that the implementer can report against them. If the PO has concerns about the requested revised dates, s/he may choose to follow up further with the implementer. If the PO and implementer determine that the date should not be changed after all, or a different target date selected, the implementer will need to enter the revised date and re-submit the quarterly report for approval.

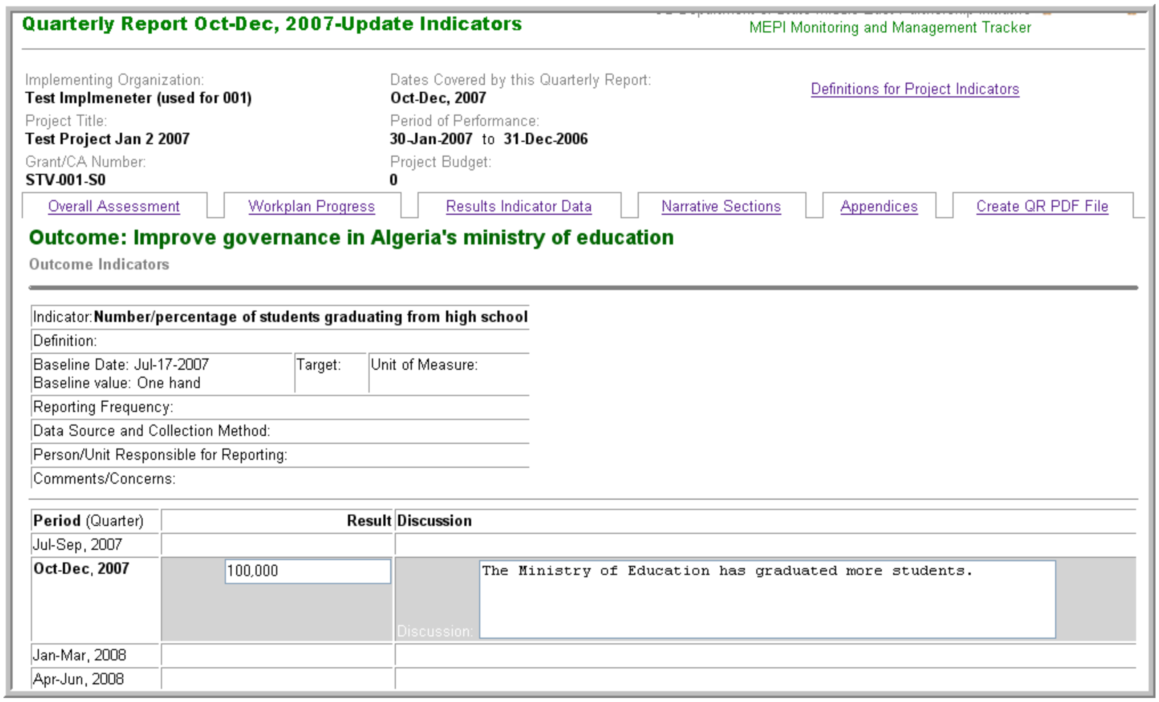
Results Indicator Data

To enter data for results indicators, the implementer clicks on the “Results Indicator Data” tab on the QR screen. Each indicator included in the RMP will appear, along with any data entered in earlier time periods. The user will be able to enter new data only for the current quarter. Previously reported data cannot be changed. (If a change is required to earlier data, the implementer should contact MEPI via separate email).

Up until the QR is officially submitted to MEPI by clicking on “Submit”, the implementer can modify and save the data that has been entered for the current quarter.

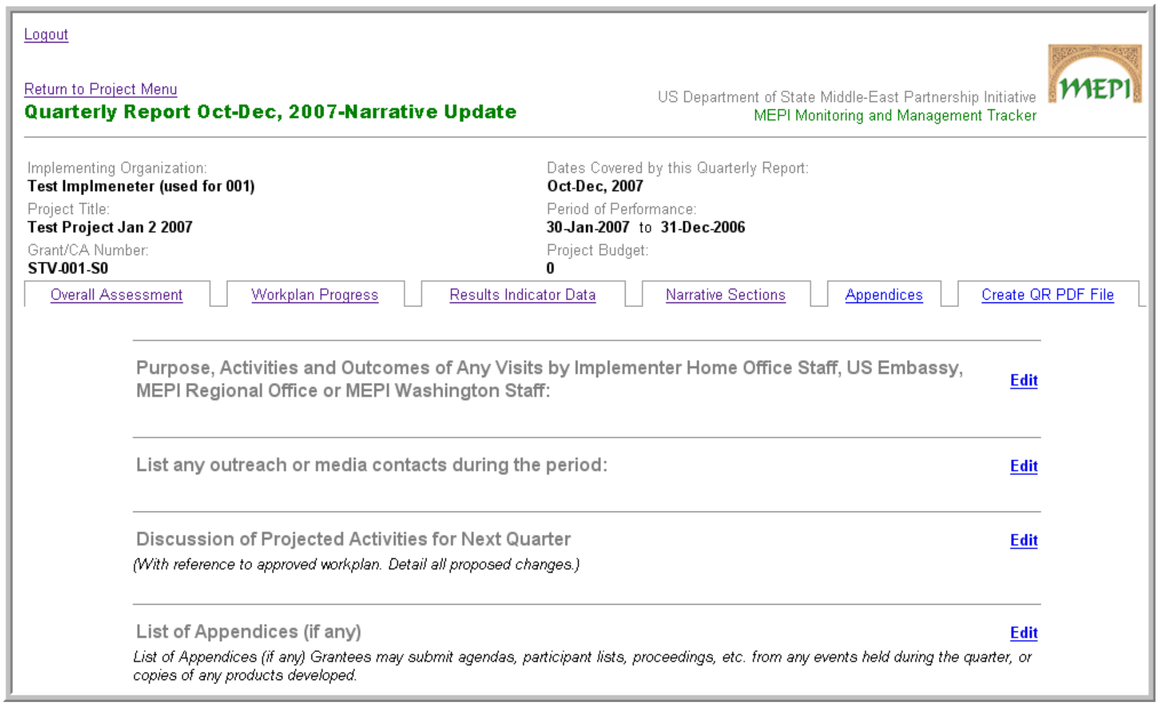
While most indicators are quantitative, the discussion field for each indicator allows up to a maximum of 4800 characters to facilitate reporting on indicators. This field provides implementers an opportunity to explain any performance data that is not on target, along with plans to improve performance. Any indicators that exceed expectations should also be discussed.

Based on the data collection frequency listed in the approved RMP, there may be indicators for which data will be collected less often than quarterly. In quarters when no new data is available to report, the implementer should enter “n/a” to make it clear that the field has not been inadvertently skipped.



Narrative Sections

To enter the narrative sections, click on the “Narrative Sections” tab to access that section of the QR. The list of four narratives areas will be shown, along with space for entering text. Information can be typed directly into the PRS or it can be prepared in another application such as MS Word and then cut and pasted into the appropriate sections.



Field length is 2GB. Please note that limits are considered the maximum appropriate length and shorter, more succinct entries are appreciated.

A detailed description of the information to be submitted in each field is below.

1. **Purpose, Activities and Outcomes of Any Visits**

   This field is used to describe the purpose, activities and outcomes of any visits to the project office or site by implementer home office staff, US Embassy, MEPI Regional Office or MEPI Washington staff. The implementer should describe each visit, including its purpose, the main activities and report on any outcomes or follow up actions. If there were no such visits during the quarter, the field should be left blank.

2. **Outreach or Media Contacts during the Period**

   This field is only used if there were any outreach activity or media contacts made during the period. Each instance should be described; if contacts resulted in written press coverage, copies of that coverage can be included as appendices (see below for discussion of appendices).

3. **Discussion of Projected Activities for Next Quarter**

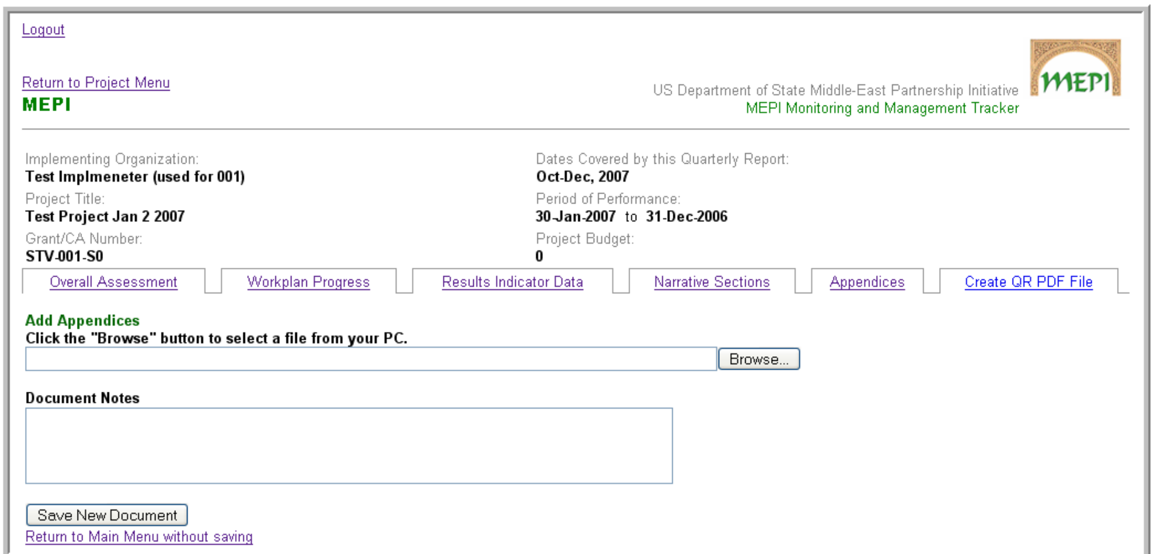
   This field of the QR is forward looking. Implementers summarize the major projected activities for the next quarter as listed in the workplan, and include any key details. Any changes to target dates requested in the workplan progress section of the report should be discussed as well.

4. **List of appendices (if any)**

Implementers are encouraged to submit appendices that contribute to MEPI's understanding of their results and activities during the quarter. Examples include:

- Agendas
- Participant lists from any events held during the quarter
- Proceedings from any events held during the quarter
- News articles or other media coverage of project activities
- Products/materials/curriculum developed

A list of any appendices being submitted with the QR should be entered in the indicated box.

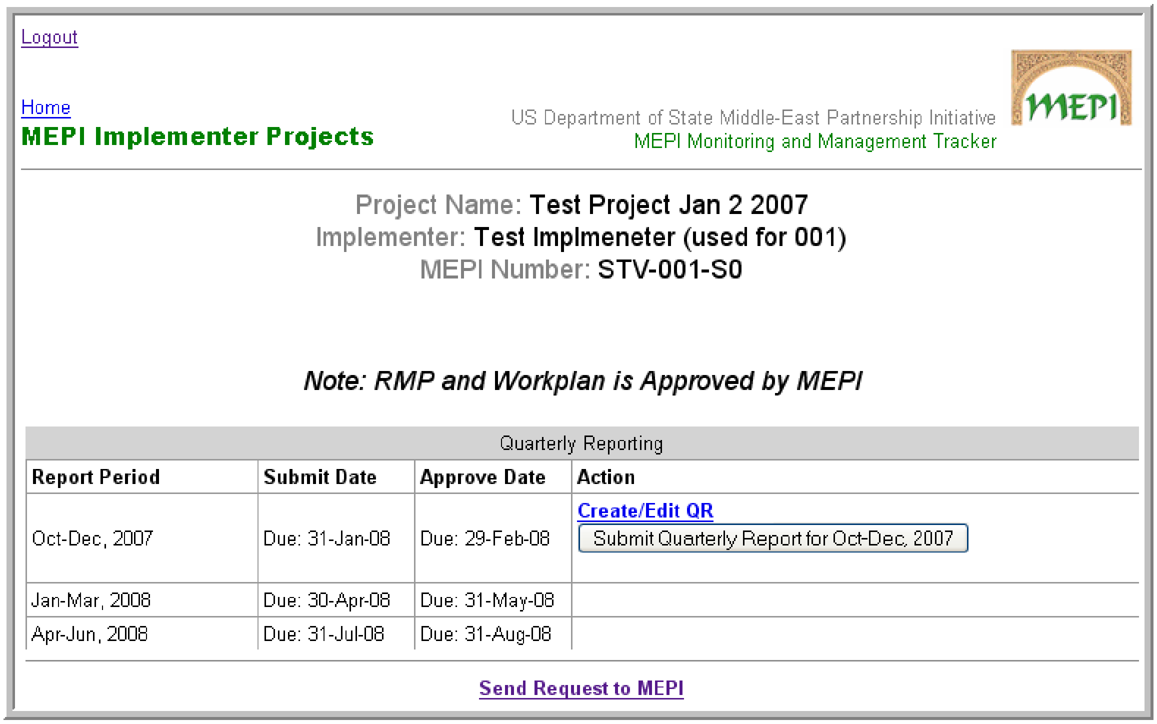


Click on the "Browse" button to attach electronic files containing the specified appendices. Any items which cannot be attached electronically should be mailed to the MEPI Grants Office, with a notation on the list of appendices that the item is being sent via mail.

PDF feature

Submitting the Quarterly Report

Once the implementer is satisfied that the QR has been filled out completely and accurately, the "Submit Quarterly Report for (date)" button should be clicked. The deadlines for QR submissions are listed on p. 20. To meet those deadlines, implementers will need to click on the "Submit Quarterly Report" button prior to midnight Washington, DC time on the date specified.


Logout

Home

MEPI Implementer Projects

US Department of State Middle-East Partnership Initiative
MEPI Monitoring and Management Tracker

Project Name: Test Project Jan 2 2007
Implementer: Test Implmeneter (used for 001)
MEPI Number: STV-001-S0

Note: RMP and Workplan is Approved by MEPI

Quarterly Reporting

Report Period	Submit Date	Approve Date	Action
Oct-Dec, 2007	Due: 31-Jan-08	Due: 29-Feb-08	Create/Edit QR Submit Quarterly Report for Oct-Dec, 2007
Jan-Mar, 2008	Due: 30-Apr-08	Due: 31-May-08	
Apr-Jun, 2008	Due: 31-Jul-08	Due: 31-Aug-08	

Send Request to MEPI

Clicking "Submit Quarterly Report" generates an automatic notification from the system to the assigned GO and PO announcing that the QR is ready for review. The PO has 30 days from the QR submission deadline to review and approve each report. When the MEPI PO officially approves a QR in the system, an automatic notification is sent via email to each of the implementer's two authorized users notifying them that the report has been approved.

NOTE: The automatic notification of workplan approval will be sent to the email addresses on file for the implementer's two authorized users. These email addresses will be used for all automatic notifications generated by the PRS. Implementers are responsible for ensuring that these email addresses are accurate and up-to-date. The "Submit Request to MEPI" command on the implementer main menu can be used to change or update the authorized users and their email addresses.

Viewing the Quarterly Report After Submission

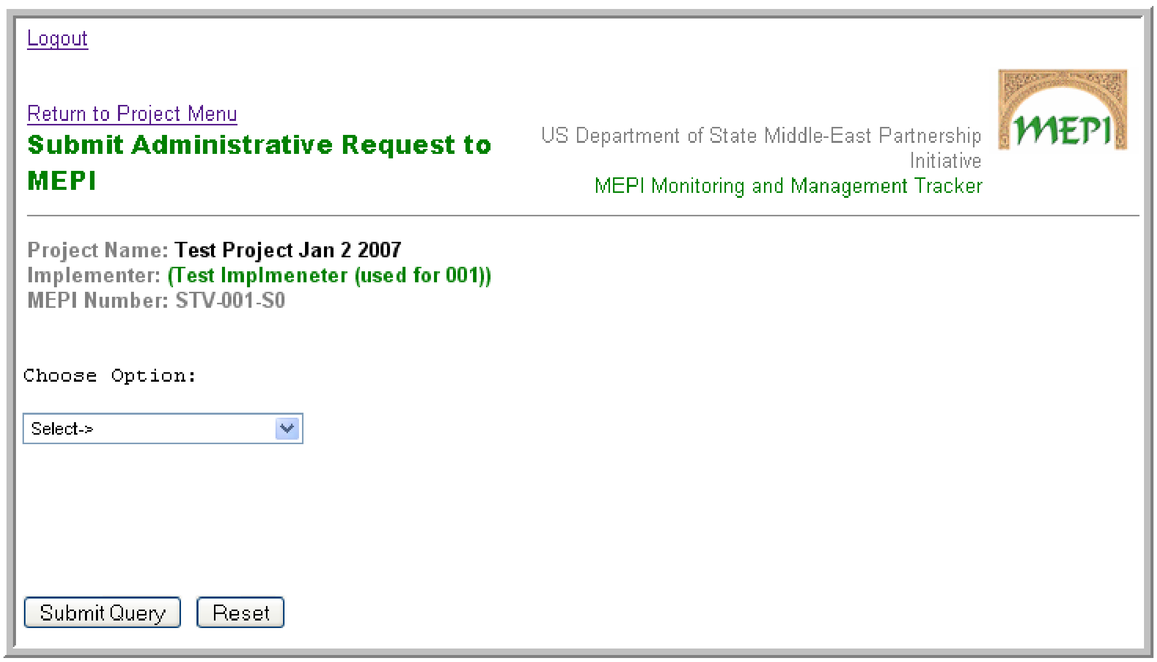
Once approved, QRs will be archived and can be viewed by clicking on the "Archived QR" link which will appear in the appropriate reporting period.

VI. Submitting Administrative Requests to MEPI via the Planning and Reporting System

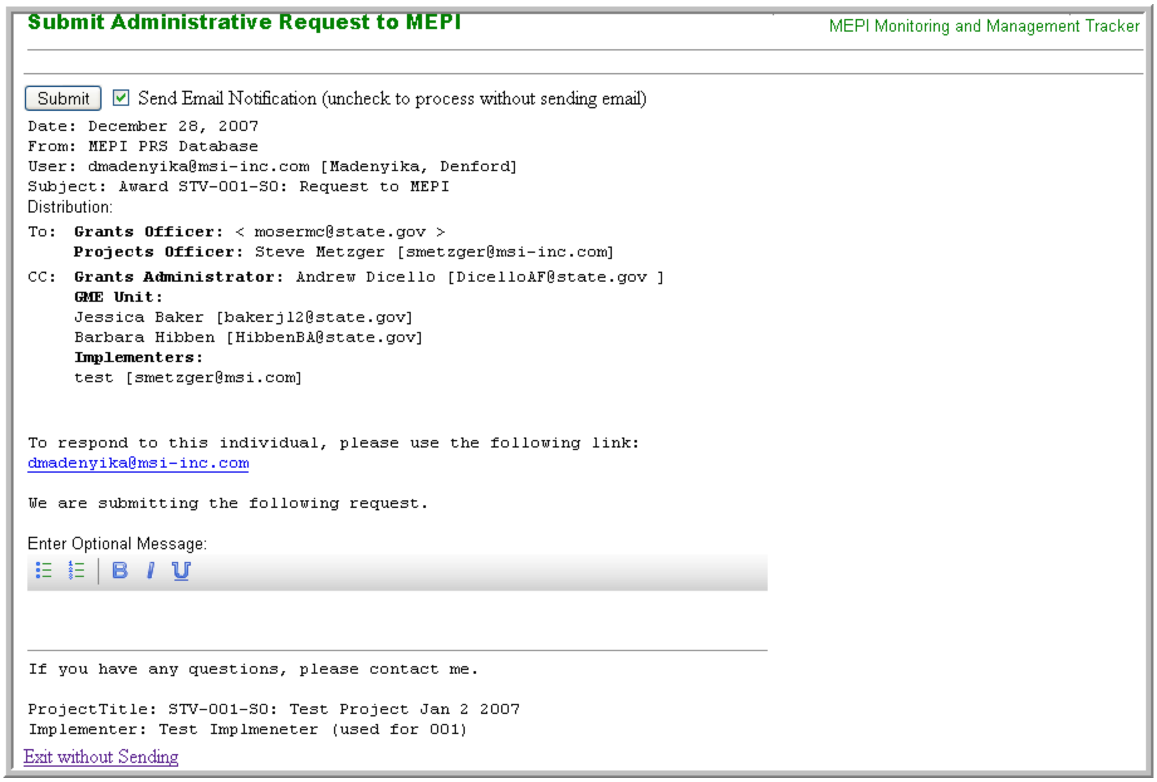
The PRS has been designed to facilitate the submission of routine administrative requests to MEPI and to ensure that such requests are properly routed and processed promptly. The benefit of using this feature is that implementer's requests and MEPI follow up can be more easily tracked than if regular e-mail channels are used.

To access the Administrative Request section of the PRS, the implementer clicks on the "Send Request to MEPI" command from the implementer main menu. The main administrative request screen will appear and the user can select the type of administrative request they wish to submit. The types of standard requests available from the menu are:

- Request Travel Approval
- Request No-Cost-Extension
- Replace Authorized User
- Update Contacts
- Request Revision of the Workplan
- Other



After the implementer selects the type of request they are wish to submit, a dialogue box similar to a blank email form will open that indicates the name(s) of MEPI staff member who will receive request. The input field provides space for the implementer to enter the details of the request.


Submit Administrative Request to MEPI
MEPI Monitoring and Management Tracker

Submit ☑ Send Email Notification (uncheck to process without sending email)

Date: December 28, 2007
From: MEPI PRS Database
User: dmadenyika@msi-inc.com [Madenyika, Denford]
Subject: Award STV-001-SO: Request to MEPI
Distribution:
To: **Grants Officer:** < mosermc@state.gov >
Projects Officer: Steve Metzger [smetzger@msi-inc.com]
CC: **Grants Administrator:** Andrew Dicello [DicelloAF@state.gov]
GME Unit:
Jessica Baker [bakerj12@state.gov]
Barbara Hibben [HibbenBA@state.gov]
Implementers:
test [smetzger@msi.com]

To respond to this individual, please use the following link:
dmadenyika@msi-inc.com

We are submitting the following request.

Enter Optional Message:

If you have any questions, please contact me.

ProjectTitle: STV-001-SO: Test Project Jan 2 2007
Implementer: Test Implmeneter (used for 001)
Exit without Sending

When the implementer clicks submit, the system will automatically deliver the request to the PO, the GO, and any other specified MEPI staff member, as well as sending a closed copy notification of the request to the email address of both of the implementer's authorized users.

The "Other" command can be used to submit any other routine requests to MEPI. The benefit of using this feature is that the request and follow up process can be more easily tracked than if regular e-mail channels are used.

The table below lists the MEPI staff to which each request will be routed.

Table 3: Types of Administrative Requests

Type of Request	Primary MEPI Recipient	With copies sent to...
Travel Authorization	Grants Administrator	MEPI Project Officer, implementer authorized users
No Cost Extension	Grants Officer	MEPI Project Officer; implementer authorized users
Replace Authorized User	Project Officer	PRS Help Desk; implementer authorized users
Other	User designated from list of Project Officer, Grants Officer and Grants Administrator	User designated MEPI staff, implementer authorized users

VIII. Project Close-Out Management Using the Planning and Reporting System

Close-Out Notifications

Forty-five days before the anticipated project end date an automatic notification will be generated informing both the implementer's authorized users and the PO that the project is nearing its end date and that close-out procedures should begin.

The actual close-out period begins when the project period of performance ends. At this point an automatic email is generated to the implementer and PO providing them with a list of all close-out responsibilities and informing them that these responsibilities must be completed in 90 days. As part of the close-out responsibilities, the implementer must provide MEPI with all required project documents. These documents are sent to the PO and GO via email.