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| **TOOL: M&E PROPOSAL PROCESS CHECKLIST** |
| Purpose | This checklist is the primary tool used to ensure that all elements of the initial M&E plan have been covered in the project proposal. |
| Information Sources | **Information the project team should have before the M&E Proposal:*** Donor M&E Requirements
* Grants Acquisition Manual
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| Who | This tool should be used by the person who is coordinating the project design and its documentation. It may also serve as a reference tool for other members of the proposal development team.  |
| When | The Initial M&E Plan Checklist should be updated before a project/proposal kickoff meeting to reflect any additional donor requirements identified during the donor M&E research. * The checklist can be referenced throughout the entire project/proposal development process and should be checked for completion prior to submitting the final draft of the proposal.
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| Recommendations | The project technical team should review the checklist and answer as many items as possible with the country team and partners. Request support from the M&E team for more specific guidance.  |
| Tips | Use the DMEL Framework for more tools on each phase of the project design and planning. For example, the M&E Plan Matrix is an ideal template to work from when a USAID PMP is required. Also, a link to the USG (USAID and Dept. of State mainly) standard indicators is included.  |

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| **PLANNING FOR MONITORING AND EVALUATION****PROJECT PROPOSAL STAGE CHECKLIST** | Yes/No? |
| **Understanding the Donor and their M&E priorities (if a restricted grant proposal)** |
| 1. Have you reviewed donor’s Evaluation Policy and any other documentation available about donor’s approach to M&E?
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| 1. Is your team clear about the donor’s general standards and practices for M&E in a project?
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| 1. Have you reviewed the solicitation clearly for any notes or requirements about M&E for this particular project?
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| 1. If there is a Q&A period, have you prepared and submitted any questions relevant to M&E?
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| 1. Have you reviewed the solicitation’s evaluation criteria to examine what aspects of M&E will be evaluated, and how heavily they might be weighted compared to other aspects?
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| 1. Do any LWR staff working on the proposal have contacts with the donor that may help in clarifying any M&E requirements or expectations?
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| **Proposal Development Process** |
| 1. Will the proposal team require M&E support? If so, has the proposal team coordinated with either the Regional Monitoring Evaluation Manager or the HQ M&E team to see if they have time to support the proposal?
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| 1. Has the proposal team come to an agreement on how design, monitoring and evaluation will be described in the proposal?
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| 1. During initial budget discussions with International Finance, have you considered any significant M&E-related needs, including staffing and consultant cost, that require budget?
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| **Project Design Elements of the Proposal** |
| 1. Have you gathered all relevant materials that have data that justifies the project design? For example: needs assessments, publications and other secondary sources.
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| 1. Have you reviewed final project evaluations of previous relevant LWR projects (or mid-terms or other relevant reports of current projects)?
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| 1. Have you completed the DMEL design elements, including the Needs Assessment, Problem Analysis, Problems to Objectives, Results Framework, and Logframe?
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| **M&E in the Technical Design** |
| 1. Based on proposed project indicators, have you assessed the project’s data collection needs (i.e. baseline/endline data collection needs, on-going project data collection) and how that will influence the project’s budget and staffing?
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| 1. Is a mid-term evaluation needed?
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| 1. If a mid-term evaluation is needed, have you determined whether it will be external or internal, and if internal — conducted by whom, how, what method, etc.?
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| 1. Have you agreed on a plan for the final evaluation and prepared text for the proposal?
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| 1. Is there any need to include special data collection, special studies or research, or any additional evaluative work during the life of the project?
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| 1. Have you determined a strategy for dissemination and learning for the final evaluation and any other studies or key tools?
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| 1. Have you prepared a plan and associated budget for any additional documents (i.e. evaluation summary, toolkits, etc.), translation, learning workshops or conferences?
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| **Staffing for M&E** |
| 1. Have you determined who on the project implementation team will have primary responsibilities for M&E oversight for the project?
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| 1. Are the roles and responsibilities clear for various aspects of M&E, including the partners’ roles, other staff or project managers’ roles, or other M&E technical support (LWR or external)?
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| 1. Have you assessed the project (LWR and partner) staff’s capacity for M&E functions?
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| 1. Have you determined and incorporated capacity development and/or additional staffing needs?
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| **Other M&E Needs to Consider** |
| 1. Will the project will have any IT needs related to monitoring or evaluation? If so, are they included? For example: database for beneficiary management or indicator data tracking, GIS mapping of results, statistical analysis software.
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| **Budgeting for M&E** |
| 1. Have you calculated the salaries and benefits for any M&E staff?
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| 1. Have you calculated and included the costs of the for all M&E elements? (i.e. capacity development, baseline, mid-term, endline, final evaluation, special studies, dissemination and learning, IT, and consultant, LWR staff and partner expenses, travel, data collector costs, data entry costs)
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| 1. Have you agreed on translation needs for final documentation (i.e. evaluation, reports, or other) and calculated those costs?
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| 1. Does the budget sufficiently covers costs for meetings with the project team? For example: development of M&E Matrix, project start-up meeting, Reflection Meetings.
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