Execution and Performance Plan (EPP) Template

An Additional Help for ADS Chapter 597
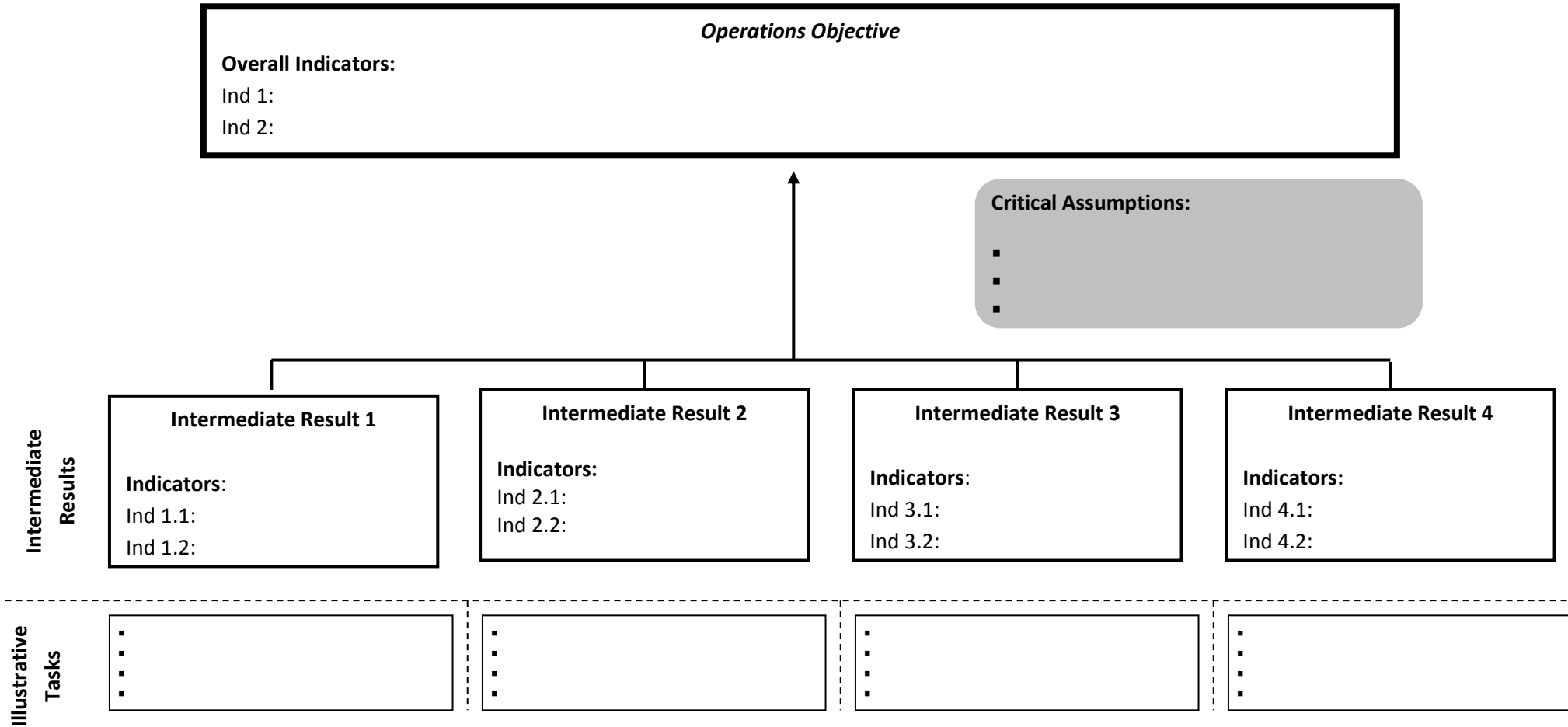
Execution and Performance Plan (EPP) Template

Instructions:

A high-level EPP must be developed within three months of the Operations Management Plan (OMP) approval. It includes:

I.   Results Framework

II.   Operations Objective Tasks and Metrics

III.   Intermediate Result Tasks and Metrics

IV.   Metric Reference Sheet Instructions and Template

I. Results Framework

Instructions: Copy and paste the approved Results Framework graphic from the Operations Management Plan onto this page.

Operations Objective

Overall Indicators:

Ind 1:

Ind 2:

Critical Assumptions:

-
-
-

Intermediate Results

Intermediate Result 1	Intermediate Result 2	Intermediate Result 3	Intermediate Result 4
Indicators:	**Indicators:**	**Indicators**:	**Indicators:**
Ind 1.1:	Ind 2.1:	Ind 3.1:	Ind 4.1:
Ind 1.2:	Ind 2.2:	Ind 3.2:	Ind 4.2:

Illustrative Tasks

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II. Operations Objective Tasks and Metrics

Instructions: Fill out the table for each OO. Add rows as necessary. Tasks should be specific with a realistic timeframe. Columns can be re-labeled depending on how often a metric will be measured.

Operations Objective 1:										
Task								**Person Responsible**		**Due Date**

Metric	**Baseline**	**Q1 Actual**	**Q1 Target**	**Q2 Actual**	**Q2 Target**	**Q3 Actual**	**Q3 Target**	**Q4 Actual**	**Q4 Target**

III. Intermediate Results Tasks and Metrics

Instructions: Fill out the table for each IR. Add rows as necessary. Tasks should be specific with a realistic timeframe. Columns can be re-labeled depending on how often a metric will be measured.

Operations Objective 1:										
Intermediate Result 1:										
Task									**Person Responsible**	**Due Date**
Metric	**Baseline**	**Q1 Actual**	**Q1 Target**	**Q2 Actual**	**Q2 Target**	**Q3 Actual**	**Q3 Target**	**Q4 Actual**	**Q4 Target**	

Operations Objective 1:										
Intermediate Result 2:										
Task									**Person Responsible**	**Due Date**
Metric	**Baseline**	**Q1 Actual**	**Q1 Target**	**Q2 Actual**	**Q2 Target**	**Q3 Actual**	**Q3 Target**	**Q4 Actual**	**Q4 Target**	

IV.   Metric Reference Sheets (MRS) Instructions and Template

Instructions: Finalize metrics developed in the OMP. Complete a MRS for each IR using the instructions on the next page.

Metric Reference Sheet Template							
Operations Objective:							
Intermediate Result:							
Metric:							
DESCRIPTION							
Precise Definition(s):							
Unit of Measure:							
Disaggregated by:							
Justification & Management Utility:							
PLAN FOR DATA ACQUISITION BY USAID							
Data Collection Method:							
Data Source(s):							
Individual(s) responsible for data collection:							
Location of data/ storage of data at USAID:							
Frequency of Data Acquisition:							
DATA QUALITY ISSUES							
Possible Data Limitations and Significance (if any):							
OTHER NOTES							
Notes on Baselines/Targets:							
Target Setting Methodology:							
Other Notes:							
PERFORMANCE METRIC VALUES							
Year	**Target**	**Actual**	**Target**	**Actual**	**Target**	**Actual**	**Notes**
baseline							
THIS SHEET LAST UPDATED ON:							

Metric Reference Sheet Instructions

Operations Objective: State title of operations objective.

Intermediate Result: State title of intermediate result.

Metric: State title of metric.

DESCRIPTION

Precise Definition(s): Fully define the metric. Elaborate any word or reference in the metric that may be unclear to a third party unfamiliar with the operating unit. Provide definitions which are operationally specific enough to enable future generations of staff and implementing partners to understand what is included and not included in the service and metric. Objectively define any markers of progress such as *initiated, adopted, implemented,* or *completed.* Clearly define broad terms so that it is clear what is specifically included and excluded. When the metric includes a rate or percentage, be sure to define the population of the numerator and of the denominator.

Unit of Measure: Enter the unit of measurement, for example, percentage or number. Clarify the minimum or maximum values, if needed (for example, minimum score is 1.0 and maximum score is 5.0). Clarify whether the number is cumulative or specific to the year (best practice is to capture data year by year and to report the trend in the data analysis).

Disaggregated by: List any planned ways of disaggregating the data (for example, by location, sex, employment category, etc.*)* and explain why the added value of analyzing the data by categories justifies the extra cost of disaggregating the data.

Justification & Management Utility: (a) Briefly describe *why* this particular metric was selected over other related metrics. Does this metric replace another metric, and if so, why? (b) Describe *how* this metric will be useful for determining the efficiency or effectiveness of the service provided. What are the assumptions about the trend of this data and its results?

PLAN FOR DATA ACQUISITION

Data Collection Method: Describe the *tools* and *methods* for collecting the raw data. Examples are: document review, structured interviews, focus group interviews, written survey, direct observation, self-reported information, database, etc.

Data Source(s): Enter the primary source of the data.

Individual(s) responsible for data collection: Identify by title the person directly responsible for acquiring, compiling, and analyzing the data.

Location of data/ storage of data: Identify where the data will be maintained in the operating unit (that is, specific file cabinet, or specific folder on shared drive).

Frequency of Data Acquisition: Enter how often and when the data will be collected. (That is, If data is collected quarterly, then the report is due on the 15th of the month following the end of the quarter).

DATA QUALITY ISSUES

Possible Data Limitations and Significance (if any): Explain any lack of confidence in, and possible problems with, the data and why that is important. For example, the data is incomplete because the tracking system is new and not every employee has been entering data on a regular basis.

OTHER NOTES

Notes on Baselines/Targets: Explain how the baseline was established and what data elements went into establishing it. If there is no baseline, explain why, how and when it will be established.

Target Setting Methodology: Explain how the target is set. Be specific about the methodology and process used to set targets.

Other Notes: Explain anything else that is relevant.

PERFORMANCE METRIC VALUES

Year	Target 2013	Actual 2013	Target 2014	Actual 2014	Target 2015	Actual 2015	Notes
2012 (baseline)							
2013							
2014							
2015							

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