

QDRP Annex 5 - Indicator Tracking Table Instructions

Background and General instructions

The Indicator Tracking Table (ITT) is a report that tracks progress on the indicators included in a country's M&E Plan. The indicators and targets should be identical to those in the latest approved M&E Plan. The ITT is part of the Quarterly Disbursement Request and Reporting Package (QDRP).

All indicators in the M&E Plan should be included in the ITT. This includes indicators at all levels of the results hierarchy including lower level output and process milestone indicators. A complete ITT provides detailed information that shows cumulative past performance, recently completed performance, and the remaining annual targets for each performance indicator.

Deviations from targets should be explained in Section D (Indicator Tracking Table Notes) of the Narrative Report (also submitted as part of the QDRP). A 2-3 sentence written explanation should be provided in this section of the narrative report for any indicator where it is projected that the annual target will not be met within 10% or more. In addition, after the end of each Compact year (i.e. in the QDRP for Quarters 6, 10 and 14), a 2-3 sentence written explanation should be provided if the annual target was missed by 10% or more.

General Timeline Clarification

The "Current Quarter" is the quarter in which the QDRP is submitted and is the Disbursement Period minus 1 quarter. The "Last Quarter" is the Disbursement Period minus 2 quarters. In other words, a QDRP that is submitted in March 2009 is for the Disbursement Period of April to June 2009. The Current Quarter is January to March 2008 and the Last Quarter is October to December 2008. The ITT includes reporting on both the Last Quarter and the Current Quarter.

Column B—Project

- ★ This column includes the Compact name or the Project name.
- ★ If the indicator is identified as a “Goal Indicator” then the Compact name should appear.
- ★ If the indicator is identified as an Objective Indicator, Outcome Indicator, Output Indicator, or Process Milestone Indicator, then the corresponding Project name should appear.

Column C—Activity

- ★ This column includes the Activity name.
- ★ If the indicator is identified as a “Goal Indicator” then the column should be left blank.
- ★ If the indicator is identified as an Objective Indicator or an Outcome Indicator and they only relate to one Activity, then the Activity name should appear. If the Indicator relates to more than one Activity, then the column should be left blank.
- ★ If the indicator is identified as an Output Indicator or Process Milestone Indicator, then the corresponding Activity name should appear.

Column D—Indicator Level

- ★ This column includes the Indicator Level (i.e. Goal Indicator, Objective Indicator, Outcome Indicator, Output Indicator or Process Milestone Indicator).

Column E—Indicator

- ★ This column includes the indicator name.

Column F—Unit

- ★ This column includes the units that the indicator is measured in.

NEW COLUMN: Column G—Indicator Classification Type

- ★ This column includes the Indicator Type (i.e. Cumulative, Incremental, Level or Date).
- ★ The Indicator Type affects how the indicators are reported and aggregated, and the way they convey information.
- ★ Cumulative—This type of indicator reports a running total. For example -- Number of beneficiaries -- when this is reported for a quarter, it includes those added that quarter, plus all those counted previously. So, if

we report 1000 beneficiaries in Quarter 9 and 1200 in Quarter 10 -- we know that we added 200 people in Quarter 10. Conversely, if by the end of Quarter 9, we know we have a running total of 1000 beneficiaries, and then we know we added 200 in Quarter 10, we report a running total of 1200 at the end of Quarter 10.

- ★ **Incremental**—This type of indicator reports just what was added additionally, or incrementally, during the quarter, or time period. So, for number of beneficiaries, if it's typed as incremental, we might report 100 beneficiaries in Q9, and then 200 in Q 10—and if we want to know the total for Q 1 through 10, we add up the amounts in each quarter.
- ★ **Level**—This type of indicator is one where we are not as concerned about incremental or cumulative increases, we just want to track what happens over time. For example, let's say we have a credit project, and we want to track the % of portfolio at risk each quarter. So we might have this indicator simply be reported each quarter, to watch how it fluctuates over time. Another example would be the poverty rate—we look at what it is to start, and what it is at the end. We can certainly find the incremental change, but the indicator is structured such that you compare one value to another value, each on their own.
- ★ **Date**—This type of indicator does not fall into any of the three categories above because the value is not expressed as a number, but as a date.

Column H—Baseline

- ★ This column includes the baseline value for the indicator.

NEW COLUMN: Column I— Cumulative Past Performance through last completed Compact Year—Cumulative Targets

- ★ This column includes the cumulative “target” value for the indicator through the last completed Compact Year. For example, if you are currently in Compact Year 2, this column should display the target for Compact Year 1. If you are in Compact Year 3, this column should display the cumulative target amount for Compact Years 1 and 2.

NEW COLUMN: Column J— Cumulative Past Performance through last c ompleted Compact Year—Cumulative Actuals

- ★ This column includes the cumulative “actual” value for the indicator through the last completed Compact Year. For example, if you are currently in Compact Year 2, this column should display the actual value for

Compact Year 1. If you are in Compact Year 3, this column should display the cumulative actual for Compact Years 1 and 2.

NEW COLUMN: Column K— Cumulative Past Performance through last completed Compact Year—Deviation

- ★ This column displays the calculation of the deviation of the reported actual and the target.
- ★ If the indicator is a numeric value then the percent deviation between the target numeric value and the actual numeric value is calculated by the following equation:
- ★ $\text{Deviation} = ((\text{actual} - \text{target}) / \text{target}) * 100$
- ★ If the indicator is a date then the difference in calendar days between the target date and actual date should be calculated. For example, if the target is Oct. 1, and the actual is Oct. 20, then the deviation is 19 days. It should be stated as “19 days past due.”
- ★ If there is no target, then the column is left blank.
- ★ If the target is zero, then the column is left blank.

Column L—Last Quarter Actuals

- ★ This column includes the “actual” value for the indicator for Last Quarter, ie, the Disbursement Period minus 2. . For example, if you are currently in Quarter 10, and the Disbursement Period is Quarter 11, you will insert the actual value for Quarter 9.
- ★ If there is no actual that is expected to be reported, then the column is left blank.

NEW COLUMN: Column M—Current Quarter Actuals

- ★ This column includes the “actual-to-date” value for the indicator for the current quarter. This is the most up-to-date information that the country can provide at the time of the submission of the QDRP.
- ★ The information provided in this column should not merely be an estimate or a guess. It should come from an already established reporting channel, and be as reliable as possible.
- ★ For example, many project implementers provide monthly reports to their respective MCAs, even though the MCAs only report quarterly to MCC. In those cases, the MCA should be able to provide 1 to 2 months of data for the current quarter, from a reporting source that is already established and approved by the MCA. Other project implementers may have a direct link to an MCA database, for example, where they

input continual, up-to-date data. In this case, the MCA should be able to pull any data that is available at the date of the QDRP submission, and include that for the Current Quarter.

- ★ It is understood that because the Current Quarter will not have ended, this information will almost definitely need to be updated the following quarter with the full quarter's results.

NEW COLUMN: Column N—Current Quarter Actuals as of (Date)

- ★ This column displays the date as of which the current quarter actual is reported. For example, if the current quarter actual is as of February 15th, the date “Feb-15-08” should be inserted.
- ★ Inserting the appropriate date is important, as it will help to provide context for Current Quarter data, since that data will not include the full quarter. For example, if the actual reported for the Current Quarter is very low, but the “as of” date only represents two weeks of that quarter, the “as of” date will help MCC understand why the number may be low at that time.

NEW COLUMN: Column O—

Performance for Current Compact Year—Annual Target

- ★ This column displays the annual target for the current Compact Year.

NEW COLUMN: Column P—

Performance for Current Compact Year—Actual for Compact Year

- ★ This column displays the cumulative reported actuals for the current Compact Year up to and including the current quarter actual. For example, if you are in Quarter 3, of Compact Year 2, this column will include the cumulative actual amount for Quarters 1, 2, and 3 of Compact Year 2. It is understood that the Quarter 3 amount will include only the actuals to date reported, and may not include an entire quarter's worth of data.

NEW COLUMN: Column Q—% Complete Towards Annual Target

- ★ This column displays the percent complete towards the annual targets for the current Compact Year.
- ★ If the indicator is a numeric value then the percent complete is calculated by the following equation:
- ★ $\% = (\text{actual} / \text{target}) * 100$
- ★ If the indicator is a date then the column is left blank.
- ★ The % complete is different from the % deviation, in Column N.

Remaining Annual Targets

- ★ These columns display the remaining annual targets for the remaining Compact Year(s). For example, if the current Compact Year is Year 3 then the table should display the annual targets from the M&E Plan for Compact Years 4 and 5.

End of Compact Target Q1 to Q20

- ★ This column displays the end of Compact target.