# Guide to the Proposal-Stage MEL Starter Template

Funders want to know that you will track results honestly and learn as you go. At proposal stage, that means a short indicator table, a reference sheet for key indicators, a few learning questions, and a realistic MEL budget. This guide explains how to complete each part of R04 to the standard funders expect.

| USE WITH | TIME NEEDED | RESULT |
| --- | --- | --- |
| R04 Proposal-Stage MEL Starter Template | Two to three hours across one or two sessions | An indicator table, reference sheets, learning questions, and costed MEL lines |

## What this guide covers

- What funders expect from MEL (monitoring, evaluation, and learning) at proposal stage
- Who should take part
- A walkthrough of every column in the indicator table, the reference sheet, the learning questions, and the budget note
- A worked example, common mistakes, and good-practice tips
- How the template links to the other four resources

## Purpose and when to use it

Monitoring tracks what is happening as the program runs. Evaluation judges how well it worked and why. Learning is the habit of using both to improve. At proposal stage, unless the funder asks for a full MEL plan, you need enough to show that your measurement is credible, proportionate, and costed.

The R04 indicator table uses the columns found in standard logframes and indicator tables, such as those used by the European Commission and the UK FCDO: result, indicator, definition, baseline, target and milestones, source and means of verification, method, frequency, responsibility, and disaggregation. The reference sheet records the detail behind each key indicator, in the style of a performance indicator reference sheet.

### Use it when

- Your logic model (R03) is agreed
- The funder asks for indicators, a results framework, a logframe, or an MEL section
- You need to cost MEL before the budget is final

### Go further when

- The funder requires a full MEL plan or an evaluation design. Use R04 as the starting point, then add evaluation questions, design, sampling, ethics, and a timeline.

## Who should be involved

| Role | What they bring |
|---|---|
| **MEL lead** | Indicator design, data sources, methods, and data quality |
| **Program lead** | What can realistically be collected during delivery, and by whom |
| **Frontline staff** | How data collection fits into sessions without disrupting them |
| **Finance lead** | The cost of each data activity, for the budget |
| **Partners** | Data they hold, and any data-sharing agreements needed |

## Choosing good indicators

Before you fill in the table, test each candidate indicator against five questions. Drop or rewrite any that fail two or more.

| Question | What a good answer looks like |
|---|---|
| **Is it valid?** | It measures the result it sits against, not something nearby that is easier to count. |
| **Is it reliable?** | Two people collecting it the same way would get the same value. |
| **Is it practical?** | Your team can collect it at the planned frequency within the budget. |
| **Is it useful?** | Someone will make a decision with it, and you know who and when. |
| **Is it sensitive to change?** | It can show movement within the life of the award. |

## Walkthrough: the indicator table

| Column | What to write | Tips |
|---|---|---|
| **Result (level and statement)** | The level and the exact wording from the logic model. | Copy the wording; do not paraphrase. Reviewers check that the two match. |
| **Indicator** | What you will measure, stated neutrally. | Write "percentage of children who," not "increase in." The direction belongs in the target. |
| **Definition, unit, and calculation** | Who is included, what counts as success, the unit, and the formula. | For a percentage, state the numerator and the denominator. |
| **Baseline (value, year)** | The starting value and when it was measured. | If you do not have it, write when you will set it. Do not invent one. |
| **Target and milestones** | The end value, and interim values with dates if the funder uses milestones. | Base targets on pilot data or published benchmarks, and say which. |
| **Data source and means of verification** | Where the data comes from and the record that proves it. | Name the document: attendance log, assessment record, or survey dataset. |
| **Method and tool** | How the data is collected and with which instrument. | Use tools that already exist where possible, and say whether they are tested. |
| **Frequency** | How often you collect and report. | Match it to when decisions are made, such as each term or each quarter. |
| **Responsible** | The role that owns the indicator. | Name a role, not a person, so it survives staff changes. |

| Column | What to write | Tips |
|---|---|---|
| **Disaggregation** | The groups you will report separately. | Sex, age, and disability are commonly expected. Add location or language if they matter for your program. |

## The indicator reference sheet

Complete one sheet for each key outcome indicator. The sheet holds detail that will not fit in the table: the precise definition of every term, the rationale and who will use the data, sampling, timing, data quality checks, and known limitations. When staff change midway through a program, the reference sheet keeps measurement consistent.

## Learning questions

Choose two to four questions the team genuinely wants answered, and say how and when you will use the answers. The six OECD DAC evaluation criteria (relevance, coherence, effectiveness, efficiency, impact, and sustainability) are a helpful prompt for questions you might otherwise miss.

## The MEL budget note

Cost MEL from the activities in your table rather than adding a flat percentage. Funders differ. The UK FCDO eligible cost guidance, for example, states that there is no specific ceiling for monitoring and evaluation costs and assesses whether the amount fits the plan. Others publish a range. Check the call.

WORKED MINI EXAMPLE

## Brightwater Reading Trust builds its indicator table

*All names, places, and figures in this example are invented for illustration.*

Brightwater's MEL officer took the outputs and outcomes from the logic model and drafted one indicator for each. The team then tested every definition by asking two coordinators to count the same register independently. Their counts differed, because one counted children who joined late. The team added "enrolled at the start of term" to the definition.

| Reference sheet field | What Brightwater wrote for its fluency indicator |
|---|---|
| **Indicator** | Percentage of regular attenders who improve their fluency score by one level or more |
| **Precise definition** | Regular attender: enrolled at the start of term and attending at least 70 percent of sessions. Improvement: a rise of one or more levels on the schools' oral reading scale between the start and end of term. |
| **Calculation** | Numerator: regular attenders who improve by one or more levels. Denominator: all regular attenders assessed at both points. |
| **Disaggregation** | Sex, age, and home language |
| **Rationale and use** | Tests the first link in the theory of change. Used each term to adjust club sessions. |
| **Data quality and limitations** | Assessors are trained volunteers; 10 percent of assessments are double-scored. Children absent on assessment days are excluded, which may bias results upward. |

Their first learning question, which session times keep attendance highest, came straight from the risk table in R03.

## Common mistakes and how to avoid them

| Mistake | Why it matters | How to avoid it |
|---|---|---|
| Too many indicators | Data collection crowds out delivery, and much of the data goes unused. | One to three indicators per result, focused on decisions you will make. |
| Vague definitions | Different staff count differently, and results cannot be compared. | Test each definition by asking two people to count the same data. |
| Invented baselines | Targets lose credibility. | Say when you will set the baseline. |
| Outputs only | Reviewers see activity but no evidence of change. | Include at least one indicator for each outcome. |
| Disaggregation added late | Tools must be redesigned, at a cost. | Decide on disaggregation before you design data collection. |
| MEL left out of the budget | The plan cannot be delivered. | Cost each data activity, then check it in R05. |

## Good-practice tips

- **Make targets SMART.** Specific, measurable, achievable, relevant, and time-bound targets are expected in most logframes, as described in the UK DFID how-to note on the logical framework.
- **Record baselines and targets with dates.** European Commission logframe guidance asks for reference years for baselines and targets.

- **Keep assumptions next to the results.** If the funder uses a logframe, carry the assumptions from R03 into its assumptions column.
- **Use credible evidence.** Gathering credible evidence is a core step in the CDC 2024 framework. Choose methods your team can apply consistently.
- **Plan how you will use the data.** Data no one uses is a cost with no benefit. Link each indicator to a decision.

## Frequently asked questions

**Do we need a reference sheet for every indicator?** For key outcome indicators, yes. For simple output counts, the table is usually enough.

**What if the funder gives us indicators?** Use them exactly as worded, and add your own only where they help you learn.

**Should we include an external evaluation?** Only if the funder requires one or the program is testing a new approach. If you include it, cost it.

## How it links to the other resources

| Resource | How it connects |
|---|---|
| R01 Bid or No Bid Funding Opportunity Checklist | MEL requirements in a call affect your capacity and effort scores. |
| R02 Pre-Proposal Planning Worksheet | Question 8 is the first draft of this table. |
| R03 Logic Model and Theory of Change | Results and assumptions come from the logic model, word for word. |
| R05 Proposal Budget Alignment Checklist | Section B checks that every MEL activity here is in the budget. |

# Want a second pair of eyes before you submit?

Edit Right Advisors is a grant writing and advisory firm. We help nonprofits and NGOs win funding and grow their impact. We can screen an opportunity with you, shape the program logic, build your MEL (monitoring, evaluation, and learning) plan, or review a full draft so that every part holds together.

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## The full series: five templates, each with a companion guide

| | |
|---|---|
| RO1 | Bid or No Bid Funding Opportunity Checklist (guide: G01) |
| RO2 | Pre-Proposal Planning Worksheet (guide: G02) |
| RO3 | Logic Model and Theory of Change Template (guide: G03) |
| RO4 | Proposal-Stage MEL Starter Template (guide: G04) |
| RO5 | Proposal Budget Alignment Checklist (guide: G05) |

## Sources and credits

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