Proposal-Stage MEL Starter Template

At proposal stage, funders want to see that you have thought through how you will track results and learn from them. Unless the funder asks for one, you do not need a full MEL (monitoring, evaluation, and learning) plan yet. You need a short, credible indicator table, a few good learning questions, and enough money in the budget to do the work.

WHO IT IS FOR	WHEN TO USE IT	BUILDS ON
Proposal writers, program leads, and MEL staff	Once your logic model is agreed, before the budget is final	R03 Logic Model and Theory of Change Template

How to use this template

1. Copy your outcomes and key outputs from the logic model into the Result column, using the same wording.
2. Choose one to three indicators for each result. Prefer indicators you can collect reliably with the time and money you have.
3. Define each indicator so that two different people would count it the same way, including the unit and, for percentages, the numerator and denominator.
4. Enter the baseline value and year if you have it. If not, say when you will set it, for example "Baseline set in month 2."
5. Set an end target and, where the funder expects them, interim milestones with dates. Note what the targets are based on, such as pilot data.
6. Name the means of verification: the document or dataset that will prove the value, such as attendance logs or assessment records.
7. Decide on disaggregation now. Splitting data by sex, age, disability, or location changes your data collection tools, so it cannot be added later without cost.

Column guide

Result	The level (output, short-term outcome, medium-term outcome, or impact) and the result statement from your logic model.
Indicator	What you will measure, stated neutrally (for example "percentage of children who," not "increase in").
Definition, unit, and calculation	Exactly how you count it: who is included, what counts as success, the unit, and the formula.
Baseline (value and year)	The starting value and when it was measured.
Target and milestones	The value you expect at the end, and interim values with dates if your funder uses milestones.
Data source and means of verification	Where the data comes from and the record that proves it.
Method and tool	How the data is collected, and with which form, test, or survey.
Frequency and responsible	How often it is collected and reported, and the role that owns it.
Disaggregation	The groups you will report separately, such as sex, age, disability, or location.

Assumptions	Kept in your logic model (R03). If your funder uses a logframe, add an assumptions column here.

A note on MEL budget lines

MEL that is not in the budget rarely happens. Cost it from the activities in your indicator table rather than adding a flat percentage. Funders differ: some set no fixed ceiling for MEL and judge whether the amount fits the plan, while others publish a range. Check the call. Typical lines include:

- MEL staff time, as a dedicated role or a share of program staff time
- Baseline, midline, and endline data collection, including travel and translation
- Tools, systems, and data quality checks
- Learning sessions, reporting, and any external evaluation the funder requires

Template: indicator table

Result (level and statement)	Indicator	Definition, unit, and calculation	Baseline (value, year)	Target and milestones	Data source and means of verification	Method and tool	Frequency	Responsible	Disaggregation

Indicator reference sheet

For each key outcome indicator, complete one reference sheet. It records the detail that will not fit in the table and keeps measurement consistent when staff change. Many funders call this an indicator reference sheet or indicator definition sheet.

Indicator and code	
Result it measures	
Precise definition (all terms defined)	
Unit, calculation, numerator, and denominator	
Disaggregation	
Why this indicator (rationale and who will use it)	
Data source and means of verification	
Method, tool, and sampling (if any)	
Frequency and timing of collection and reporting	
Responsible role	
Baseline (value and year) and targets (with dates)	
Data quality checks and known limitations	

Learning questions

Indicators tell you what is happening. Learning questions help you understand why, and what to change. Choose two to four questions the team genuinely wants answered. The OECD DAC evaluation criteria (relevance, coherence, effectiveness, efficiency, impact, and sustainability) are a useful prompt for questions you might otherwise miss.

Learning question	Why it matters	How we will answer it	When we will use the answer

WORKED MINI EXAMPLE

Brightwater Reading Trust: part of the indicator table

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

Result (level and statement)	Indicator	Definition, unit, and calculation	Baseline (value, year)	Target and milestones	Data source and means of verification	Method and tool	Frequency	Responsible	Disaggregation
Output: reading clubs delivered	Number of children attending at least 70 percent of club sessions in a term	Count of enrolled children who attend 70 percent or more of scheduled sessions in that term. Unit: children.	0 (new clubs), year 1	240 per term by term 2; milestone 150 in term 1	Attendance logs, checked weekly	Volunteer register each session	Termly	Club coordinator	Sex, age, school
Short-term outcome: children read more fluently	Percentage of regular attenders who improve their fluency score by one level or more	Numerator: regular attenders whose end-of-term score rises one or more levels on the school scale. Denominator: all regular attenders assessed.	Set in month 2	60 percent by month 12; milestone 40 percent by month 6	Assessment records	One-to-one oral reading assessment	Start and end of each term	MEL officer	Sex, age, home language
Medium-term outcome: more children at grade level	Percentage of regular attenders reading at grade-level benchmark	Numerator: regular attenders at or above the school benchmark. Denominator: all regular attenders assessed by the school.	Set in month 2	Agree with schools after baseline	School assessment records, shared under a data agreement	Records review	Yearly	MEL officer	Sex, grade, school

Learning question	Why it matters	How we will answer it	When we will use the answer
Which session times and formats keep attendance highest?	Attendance drives every outcome	Compare attendance logs across clubs; ask children and parents	Term planning, each term
Do gains in clubs show up in class work?	Tests whether the main assumption holds	Short teacher survey and review of class assessments	Annual review with schools

MEL budget line	How it was costed
MEL officer	A share of one salary across all 24 months, based on the time the indicator table needs
Reading assessments	Assessor hours per child per assessment, times the number of children and terms, plus printed booklets
Data system and learning sessions	A simple survey and attendance tool, two shared tablets, and one half-day reflection session with schools and volunteers each term

The targets above are illustrative. Base real targets on your own baseline and pilot data.

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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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

Indicator fields compared with common indicator reference sheet practice and with the logframe columns used by the European Commission (indicators, baseline, target, sources and means of verification, assumptions): European Commission, EXACT wiki, Logical Framework Approach, https://wikis.ec.europa.eu/spaces/ExactExternalWiki/pages/50108980/Logical+Framework+Approach; and UK DFID (now FCDO), How to note: guidance on using the revised logical framework, https://www.gov.uk/government/publications/dfid-how-to-note-guidance-on-using-the-revised-logical-framework.

OECD, Evaluation Criteria: https://www.oecd.org/en/topics/sub-issues/development-co-operation-evaluation-and-effectiveness/evaluation-criteria.html. Kidder DP, Fierro LA, Luna E, et al. CDC Program Evaluation Framework, 2024. MMWR Recommendations and Reports 2024;73(6): https://www.cdc.gov/mmwr/volumes/73/rr/rr7306a1.htm.

On MEL budgets with no fixed ceiling, see FCDO, Programme expenditure: eligible cost guidance (August 2021), section 8.5: https://www.gov.uk/government/publications/dfid-accountable-grant-arrangement-budget-template-and-guidance.

All accessed October 27, 2026. The template, guidance, and example are original Edit Right Advisors material.

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