

Guide to completing Actuals vs Targets template

- The actuals vs targets spreadsheet assesses the extent to which a program has completed its stated objectives.
- It compares actuals and targets for each indicator by using a scoring mechanism to assign ratings of:
 - ‘Extremely below’ (over 50% below target),
 - ‘Below’ (between 10-50% below target),
 - ‘Met’ (within 10% above or below target),
 - ‘Above’ (between 10-50% above target) or
 - ‘Extremely above’ (over 50% above target)
- This document provides guidance on how to complete both the 4-level and 5-level Actuals vs Targets templates to easily assess the performance of your program.

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Section 1: About the Actuals vs Targets template

Improvements to the Actuals vs Targets template for FIPR Toolkit v2

The updated Actuals vs Targets template includes several improvements to make it easier to assess program performance.

- It now has five ratings instead of three ('Extremely Below', 'Below', 'Met', 'Above' and 'Extremely Above'), which capture a wider range program performance.
- It automatically calculates these ratings and generates visually appealing, exportable summary tables, making the overall process of assessing actuals against targets far easier, quicker and more accurate.
- It dynamically responds to individual program characteristics, with options for different program lengths, reporting periods, result-framework terminology and number formats.

This guidance document will go into all of these features in more detail.

Before you start: choose between the 4-level and 5-level template

There are two formats of the Actuals vs Target spreadsheet to choose from, a '4-level' variant and a '5-level' variant. In order to decide which one to use, it is first necessary to understand Result Levels:

Result Levels

The Actuals vs Targets template automatically assigns scores to groups of indicators based on their position in the results chain hierarchy.

With reference to the image below, the template considers indicators which effect a '**tangible change**' or an '**intermediate change**'; these are classified as either Result Level 3, 4 or 5. Those indicators which pertain to an 'ultimate desired change' are not included for assessment because they refer to phenomena that Mercy Corps cannot directly influence. If a Results Framework contains 'specific interventions', these will be classified as (or 'rolled-up' into) Result Level 3.

The 4-level template should be used when Results Frameworks do not contain any indicators at Result Level 5; an example is provided in the top row of the table above. Below the table, a set of definitions will help you classify your own Result Levels.

Object	Ultimate desired change	Intermediate change to which intervention contributes		Tangible change directly attributable to intervention	Specific interventions	
		Result Level 5	Result Level 4			
Example 1	Goal	Purpose Specific Objective Purpose Purpose Intermediate Result	Outcome	Output	Activity	
Example 2	Impact		Outcome	Output	Input	
Example 3	Goal		Sub-purpose	Intermediate Outcome	Output	Process
Example 4	Overall Objective		Purpose	Result	Activity	
Example 5	Goal		Sub-purpose	Intermediate Outcome	Output	
Example 6	Goal		Sub-purpose	Output	Input	
Example 7	Strategic Objective		Sub-intermediate Result	Output	Input	

Ultimate desired changes pertain to longer-term impacts such as transformation or sustainability that are often not specific to a single program. Rather, these indicators are program, sector, or regional objectives to which other programs and variables will also contribute. For example, prevalence of stunted children under five years of age or percentage of people living on less than \$1.25/day. Indicators at this level are common; however, program designers must recognize that there are many contributing factors outside of the program's control. For this reason, Mercy Corps, like some donors, does not require that the Program Managers measure the impact of a program against the goal.

Intermediate changes pertain to changes in status, practices or behaviors to which program interventions contribute. For example, percentage of children under age five who had diarrhea in the prior two weeks or mean number of food groups consumed by women of reproductive age (15–49 years). Intermediate changes are required steps in the process between tangible changes and the ultimate desired change; they are necessary mid-points between the two.

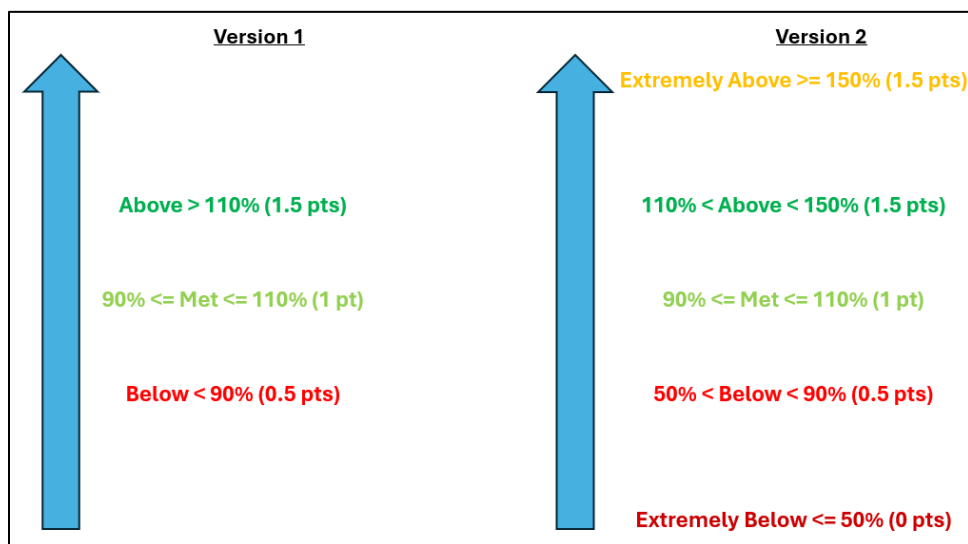
Tangible changes capture immediate effects that are directly attributable to program interventions. They do not track deliverables, such as people trained or items distributed, but rather the effects of these deliverables, such as how delivered items have been used to acquire certain goods, services, knowledge or skills.

Specific interventions track progress on implementation. Indicators at this level usually directly relate to the description of the activity and show what has been done or implemented and how well it has been done. For example, number of health clinic staff members attending workshops and number of health clinics represented by workshop attendees.

How the Actuals vs Targets template scores program performance

Updated scoring system

The updated FIPR toolkit uses a new scoring system to better assess program performance. Whereas Version 1 had three ratings for comparing indicator actuals against their targets ('Below', 'Met' and 'Above'), Version 2 adds two more ('Extremely Below' and 'Extremely Above'), for a total of five.



As the image above shows, points are awarded in 0.5-point increments. Note that both 'Extremely Above' and 'Above' receive the same number of points (1.5); this ensures that programs are not incentivized to drastically over-shoot set targets, which is indicative of poor planning and program-management.

Assessment Levels

The Actuals vs Targets template assigns scores to indicators at both the individual and aggregate levels. It then calculates averages across these scores to provide a snapshot of overall program performance. Depending on whether you are using the 4- or 5-level template, the template will use either 4 or 5 Assessment Levels. These are described below.

Assessment Level 1

- Assessment Level 1 produces a rating for each individual indicator every year or quarter (depending on the reporting period selected).
- In the image below, once the user enters the target and actual for each quarter, the template automatically calculates the percentage difference and then assigns a rating and a score. For Q1, the actual is 20% above target, which corresponds to a rating of 'Above' and a score of 1.5.

		Year 1-Q1	Year 1-Q2	Year 1-Q3	Year 1-Q4
Targets →		5.00	7.00	9.00	10.00
Actuals →		6.00	6.00	9.00	5.00
Notes →					
		1.5	0.5	1.0	0.0
Level 1 assessment (by target period) =>		Above	Below	MET	Extremely below
% difference actual vs target =>		20%	-14%	0%	-50%

Assessment Level 2

- Assessment Level 2 produces a rating for each individual indicator across the length of the program (as opposed to each year or quarter).
- In the image below, the spreadsheet automatically calculates the cumulative values for the targets and actuals, and their percentage difference. It then assigns ratings and scores. As below, the actual is 16% below target, giving a rating of 'Below' and a score of 0.5.

		Year 1-Q1	Year 1-Q2	Year 1-Q3	Year 1-Q4	Cumulative (LOP)
Targets →		5.00	7.00	9.00	10.00	31.00
Actuals →		6.00	6.00	9.00	5.00	26.00
Notes →						
		1.5	0.5	1.0	0.0	0.5
Level 1 assessment (by target period) =>		Above	Below	MET	Extremely below	
% difference actual vs target =>		20%	-14%	0%	-50%	-16%
						Level 2 assessment (this indicator for LoP) =>
						Below

- The template then automatically generates a summary table of all indicators. This allows users to easily understand program performance at a glance.
- In the image below, ratings and scores for Assessment Level 2 are reported for indicators at different levels of the results chain (in this example, we use the nomenclature 'Purpose', 'Sub-purpose', and 'Intermediate Outcome' for, respectively, Result Levels 5, 4 and 3).

Object	Row no.	Indicator name	Internal indicator number	Assessment Level:	
				2 (rating)	2 (score)
Purpose 1, indicator 1 ()	11	Average rating of government's ability to be responsive to citizen's needs (including transparency, inclusivity, effectiveness etc.) as measured on a scorecard (BL +3)	1.0.0.1	Above	1.5
Sub-purpose 1.1, indicator 1 ()	104	Percent of beneficiaries who believe they can influence decisions of local government officials or customary/traditional leaders at the local level	1.1.0.0.1	MET	1.0
Sub-purpose 1.1, indicator 2 ()	113	M40 percent of USG-assisted organizations with increased performance	1.1.0.0.3	MET	1.0
Intermediate Outcome 1.1.1., indicator 1 (Sub-purpose 1.1)	197	Percent of community members reporting advocating their needs	1.1.1.0.1	MET	1.0
Intermediate Outcome 1.1.1., indicator 2 (Sub-purpose 1.1)	206	(Output): No. of CSOs receiving capacity building training	1.1.1.1a	MET	1.0
Intermediate Outcome 1.1.1., indicator 3 (Sub-purpose 1.1)	215	(Output) No. of meetings between community networks and community leaders (CSOs, government representatives and traditional leaders) held annually	1.1.1.2a	MET	1.0
Intermediate Outcome 1.1.1., indicator 4 (Sub-purpose 1.1)	224	(Output) No. of Resilience Action Committees (RACs) formed or strengthened with USG assistance	1.1.1.3a	MET	1.0

Assessment Level 3

- Assessment Level 3 takes the average of the scores for the indicators under each result at level 3, across the length of the program.
- In the image below, the template takes an average of scores of the indicators under Intermediate Outcome 1.1.1 (which is at Result Level 3) to produce an overall rating of 'Met'. The vertical purple bar shows which indicators have been taken into account to produce this rating.

Object	Row no.	Indicator name	Internal indicator number	Assessment Level:		
				2 (rating)	2 (score)	3 (rating)
Purpose 1, indicator 1 ()	11	Average rating of government's ability to be responsive to citizen's needs (including transparency, inclusivity, effectiveness etc.) as measured on a scorecard (BL +3)	1.0.0.0.1	Above	1.5	
Sub-purpose 1.1, indicator 1 ()	104	Percent of beneficiaries who believe they can influence decisions of local government officials or customary/traditional leaders at the local level	1.1.0.0.1	MET	1.0	
Sub-purpose 1.1, indicator 2 ()	113	M40 percent of USG-assisted organizations with increased performance	1.1.0.0.3	MET	1.0	
Intermediate Outcome 1.1.1., indicator 1 (Sub-purpose 1.1)	197	Percent of community members reporting advocating their needs	1.1.1.0.1	MET	1.0	
Intermediate Outcome 1.1.1., indicator 2 (Sub-purpose 1.1)	206	(Output): No. of CSOs receiving capacity building training	1.1.1.1a	MET	1.0	
Intermediate Outcome 1.1.1., indicator 3 (Sub-purpose 1.1)	215	(Output) No. of meetings between community networks and community leaders (CSOs, government representatives and traditional leaders) held annually	1.1.1.2a	MET	1.0	
Intermediate Outcome 1.1.1., indicator 4 (Sub-purpose 1.1)	224	(Output) No. of Resilience Action Committees (RACs) formed or strengthened with USG assistance	1.1.1.3a	MET	1.0	
Assessment Level 3, L3 rating for Intermediate Outcome 1.1.1., Sub-purpose 1.1	281					MET

Assessment Level 4

- Assessment Level 4 takes the average of the scores for the indicators under each result at level 4, across the length of the program.
- In the image below, the template takes an average of scores of the indicators under Sub-purpose 1.1 (which is at Result Level 4) to produce an overall rating of 'Met'. The vertical blue bar shows which indicators have been taken into account to produce this rating. Notice how Result Level 3 indicators (associated with Intermediate Outcome 1.1.1) are also included in the calculation; this is because each result at level 3 has a causal relationship with, and is therefore 'nested under', a level 4 result.

Object	Row no.	Indicator name	Internal indicator number	Assessment Level:			
				2 (rating)	2 (score)	3 (rating)	4 (rating)
Purpose 1, indicator 1 ()	11	Average rating of government's ability to be responsive to citizen's needs (including transparency, inclusivity, effectiveness etc.) as measured on a scorecard (BL +3)	1.0.0.0.1	Above	1.5		
Sub-purpose 1.1, indicator 1 ()	104	Percent of beneficiaries who believe they can influence decisions of local government officials or customary/traditional leaders at the local level	1.1.0.0.1	MET	1.0		
Sub-purpose 1.1, indicator 2 ()	113	M40 percent of USG-assisted organizations with increased performance	1.1.0.0.3	MET	1.0		
Intermediate Outcome 1.1.1., indicator 1 (Sub-purpose 1.1)	197	Percent of community members reporting advocating their needs	1.1.1.0.1	MET	1.0		
Intermediate Outcome 1.1.1., indicator 2 (Sub-purpose 1.1)	206	(Output) No. of CSOs receiving capacity building training	1.1.1.1a	MET	1.0		
Intermediate Outcome 1.1.1., indicator 3 (Sub-purpose 1.1)	215	(Output) No. of meetings between community networks and community leaders (CSOs, government representatives and traditional leaders) held annually	1.1.1.2a	MET	1.0		
Intermediate Outcome 1.1.1., indicator 4 (Sub-purpose 1.1)	224	(Output) No. of Resilience Action Committees (RACs) formed or strengthened with USG assistance	1.1.1.3a	MET	1.0		
Assessment Level 3, L3 rating for Intermediate Outcome 1.1.1., Sub-purpose 1.1		281				MET	
Assessment Level 4, L4 rating for Sub-purpose 1.1		674					MET

Assessment Level 5

- As already discussed, not all Results Frameworks will have results at level 5 or assessments at level 5. For those that do, Assessment Level 5 takes the average of the scores for the indicators under each result at level 5, across the length of the program.
- In the image below, the template takes an average of scores of the indicators under Purpose 1 (which is at Result Level 5) to produce an overall rating of 'Met'. The vertical grey bar demonstrates that all of the indicators in the table, including those at Result Levels 3 and 4 (associated with Sub-purpose 1.1 and Intermediate Outcome 1.1.1), have been taken into account to produce this rating; this is because each result at levels 3 and 4 has a causal relationship with, and is therefore 'nested under', a level 5 result.
- The results template produces one summary table and one overall rating and score for each result at level 5.

Object	Row no.	Indicator name	Internal indicator number	Assessment Level:				
				2 (rating)	2 (score)	3 (rating)	4 (rating)	5 (rating)
Purpose 1, indicator 1 ()	11	Average rating of government's ability to be responsive to citizen's needs (including transparency, inclusivity, effectiveness etc.) as measured on a scorecard (BL +3)	1.0.0.1	Above	1.5			
Sub-purpose 1.1, indicator 1 ()	104	Percent of beneficiaries who believe they can influence decisions of local government officials or customary/traditional leaders at the local level	1.1.0.0.1	MET	1.0			
Sub-purpose 1.1, indicator 2 ()	113	M40 percent of USG-assisted organizations with increased performance	1.1.0.0.3	MET	1.0			
Intermediate Outcome 1.1.1., indicator 1 (Sub-purpose 1.1)	197	Percent of community members reporting advocating their needs	1.1.1.0.1	MET	1.0			
Intermediate Outcome 1.1.1., indicator 2 (Sub-purpose 1.1)	206	(Output) No. of CSOs receiving capacity building training	1.1.1.1a	MET	1.0			
Intermediate Outcome 1.1.1., indicator 3 (Sub-purpose 1.1)	215	(Output) No. of meetings between community networks and community leaders (CSOs, government representatives and traditional leaders) held annually	1.1.1.2a	MET	1.0			
Intermediate Outcome 1.1.1., indicator 4 (Sub-purpose 1.1)	224	(Output) No. of Resilience Action Committees (RACs) formed or strengthened with USG assistance	1.1.1.3a	MET	1.0			
Assessment Level 3, L3 rating for Intermediate Outcome 1.1.1., Sub-purpose 1.1	281					MET		
Assessment Level 4, L4 rating for Sub-purpose 1.1	674						MET	
Sub-purpose 1.2, indicator 1 ()	687	Percentage of local government budgets that have allocated funds for community priorities	1.2.0.0.1	MET	1.0			
Intermediate Outcome 1.2.1, indicator 1 (Sub-purpose 1.2)	780	(Output) No. of contracts signed between communities and service providers/duty bearers	1.2.1.1a	Extremely Above	1.5			
Assessment Level 3, L3 rating for Intermediate Outcome 1.2.1, Sub-purpose 1.2	864					Extremely Above		
Intermediate Outcome 1.2.2, indicator 1 (Sub-purpose 1.2)	878	No. of local government development plans that integrate the priorities of communities	1.2.2.0.1	Below	0.5			
Intermediate Outcome 1.2.2, indicator 2 (Sub-purpose 1.2)	887	(Output) No. of Civil Society Organizations (CSOs) participating in annual government budget meetings	1.2.2.1a	MET	1.0			
Assessment Level 3, L3 rating for Intermediate Outcome 1.2.2, Sub-purpose 1.2	962					MET		
Intermediate Outcome 1.2.3, indicator 1 (Sub-purpose 1.2)	976	No. of formal and informal government accountability mechanisms established or strengthened	1.2.3.0.1	Extremely Above	1.5			
Assessment Level 3, L3 rating for Intermediate Outcome 1.2.3, Sub-purpose 1.2	1060					Extremely Above		
Assessment Level 4, L4 rating for Sub-purpose 1.2	1257						MET	
Assessment Level 5, L5 rating for Purpose 1	3007							MET

Understanding how Result Levels and Assessments Level interact with each other

The Actuals vs Targets template uses Result Levels and Assessment Levels to form a comprehensive picture of program performance.

As a reminder, Assessment Levels 1 and 2 are used for each individual indicator: Level 1 analyzes indicator results for each reporting period (for level 1) while Level 2 analyzes them for the length-of-program (for level 2). Meanwhile, Assessment Levels 3, 4 and 5 are used for analyzing various groupings of indicators across the length-of-program.

The image below provides a worked example to summarize how Assessment Levels and Result Levels interact to produce a series of program performance scores.

		Assessment Level 1			Assessment Level 2	Assessment Level 3	Assessment Level 4	Assessment Level 5	
		Y1 <i>Compares year 1 targets vs actuals for each indicator</i>	Y2 <i>Compares year 2 targets vs actuals for each indicator</i>	Y3 <i>Compares year 3 targets vs actuals for each indicator</i>	LoP <i>Takes an average of Assessment Level 1 scores for each indicator across years 1-3</i>	LoP <i>Considers Results Level 3 indicators only</i>	LoP <i>Considers Results Level 3 and 4 indicators</i>	LoP <i>Considers all indicators under a specific result at level 5</i>	
Result Level 5		Purpose 1							
		Indicator 1, Purpose 1	Met	Extremely Above	Below	Met	Not included in Assessment Level 3	Not included in Assessment Level 4	Met <i>Takes an average of Assessment Level 2 ratings for all nine indicators under Purpose 1, SP 1.1 and IO 1.1.1</i>
		Indicator 2, Purpose 1	Above	Below	Above	Above			
		Indicator 3, Purpose 1	Below	Above	Above	Above			
Result Level 4		Sub-purpose 1.1							
		Indicator 1, SP 1.1	Below	Met	Below	Below	Not included in Assessment Level 3	Met <i>Takes an average of Assessment Level 2 ratings for all six indicators under SP 1.1 and IO 1.1.1</i>	
		Indicator 2, SP 1.1	Met	Above	Met	Met			
		Indicator 3, SP 1.1	Below	Extremely Below	Extremely Above	Below			
Result Level 3		Intermediate Outcome 1.1.1							
		Indicator 1, IO 1.1.1	Below	Met	Below	Below	Above <i>Takes an average of Assessment Level 2 ratings for all three indicators under IO 1.1.1</i>		
		Indicator 2, IO 1.1.1	Met	Above	Above	Above			
		Indicator 3, IO 1.1.1	Extremely Above	Below	Above	Above			

Section 2: How to use the Actuals vs Targets template

Step 1: Practice Module

The following instructions will guide you through the practice module. This will help you understand the fundamentals of the template before you enter your program's data,

- In the “Practice Module” tab in the workbook, you will find two modules, one for “Indicator 1” and the other for “Indicator 2”. A module is an Excel table which details the results of one single indicator in your results framework.
- Follow the guide below to fill out the practice module. You will need to fill in all of the yellow boxes; once you have, they will change to dark yellow.

Cell	Cell description	Action
B1 and B2	<p>Purpose, Sub-purpose or Intermediate Result?</p> <p><i>Cells B1 and B2 show which Results Level the module corresponds to. In this example, the module is set up to record data at the “Intermediate Outcome” level. This is equivalent to Results Level 3 and is sometimes referred to as an “Intermediate Result” (though, as detailed later on, you can define your own names for each Results Level if you wish).</i></p>	No action necessary
D2	<p>Result statement</p> <p><i>Enter the result statement for the Intermediate Outcome. Remember that this should explain what the program expects to accomplish at the program-participant level and how this contributes to population-level changes over time.</i></p>	Type in an example result statement of your choice
B3	<p>Result identifying number</p> <p><i>Enter the identifying number your first result. This should correspond to your results framework and IPTT.</i></p>	Type in an example result identifying number of your choice
A6	<p>Indicator number</p> <p><i>Enter the indicator number; this should correspond to your results framework and IPTT.</i></p> <p><i>Note that in cell A4, the spreadsheet allocates an automatic number to the indicator; this is an</i></p>	Type in an example indicator number of your choice

	<i>internal tracking number which allows the spreadsheet to calculate overall scores</i>	
A8	Indicator name <i>Enter the indicator name for the indicator you wish to record data for. It should correspond to your results framework and IPTT.</i>	Type in an example indicator name of your choice
C5	Increasing or decreasing indicator? <i>Specify whether the indicator is increasing or decreasing. For example, if you are aiming to increase school enrollment over the course of the program, your indicator will be increasing. By contrast, perhaps you want to decrease the incidence of malaria; in this instance, your indicator will be decreasing.</i>	Set to increasing
C6	Number or percent? <i>Changing the value in this cell will change the format of the numbers in cells F5:AD5 and F6:AD6. It will also change the way cumulative targets and actuals are calculated in cells AD5 and AD6.</i> <i>Cumulative number: this means that every year's results add on from the previous years'. For instance, if you aim to reach 30 people a year for 3 years, this would mean that the year 1 target would be 30, the year 2 target would be 60 and the year 3 target would be 90.</i> <i>Non-cumulative number: in the example given above, each year's target would be 30.</i>	Set to Number (non-cumulative)
C7	Is this an external or an internal indicator? <i>"External" means that the indicator must be reported to the donor</i> <i>"Internal" denotes an indicator that only needs to be reported internally within Mercy Corps</i>	Set to External
C10	MC Regional KPI? <i>A Mercy Corps-specified KPI is an indicator designated as a Key Performance Indicator by Mercy Corps.</i> <i>If you're unsure, set to Don't Know</i>	For this practice module, enter No

C11	Enter MC Regional KPI number <i>This field only appears if you set cell C10 to “Yes”</i>	No action required
F5:AC5	Targets <i>Enter the target for each period the program is active (if the program is active for fewer than the given number of periods, leave the remaining cells blank)</i> <i>If there was no target for a given year/quarter but the program was active, enter 0 as the target.</i>	Enter 30, 40, 50 and 60 in cells F5:I5. Because our program is only one year long, leave the remaining cells (J5:AC5) blank
F6:AC6	Actuals <i>Enter the actuals figure attained for each period the program is active (if the program is active for fewer than the given number of periods, leave the remaining cells blank)</i> <i>Leave actuals cells blank if you have not yet collected the necessary data (for instance, if you are at the mid-line phase of a program, you’ll probably only be able to enter actuals data for half of the total number of active years of the program).</i> <i>Once you are at the end of the program, you will need to ensure that the actuals cells are non-blank for each active year of the program. In cases where, for whatever reason, you do not have access to the necessary data, you should enter a zero into the actuals cell.</i>	Enter 20, 43, 60 and 30 in cells F6:I6. Because our program is only one year long, leave the remaining cells (J6:AC6) blank
AD5	Cumulative LOP – target <i>This cell displays the overall target for the entire length of program (LOP). Note that it only calculates values for pairs of actual and target cells that do not contain any blanks.</i> <i>If the targets and actuals are in the format “Number (non-cumulative)”, this cell will simply be an addition of cells F7:M7</i> <i>If you are using cumulative numbers or percentages, this number will equal the value in the last active period.</i>	Try deleting the value in cell I5, what do you notice happens in cells AD5 and AD6? Remember that AD5 and AD6 will not take into account pairs of actuals and targets if either one of them is blank. In this instance, because I5 is now blank, cells AD5 and AD6 ignore both I5 and I6.

AD6	<p>Cumulative LOP - actuals</p> <p><i>This cell displays the actuals attained for the entire length of program (LOP). Note that it only calculates values for pairs of actual and target cells that do not contain any blanks.</i></p> <p><i>If the targets and actuals are in the format “Number (non-cumulative)”, this cell should simply be an addition of cells F6:M6</i></p> <p><i>If you are using cumulative numbers or percentages, this number will equal the value in the last active period.</i></p>	<p>Try deleting the value in cell H6, what do you notice happens in cells AD5 and AD6?</p> <p>Remember that AD5 and AD6 will not take into account pairs of actuals and targets if either one of them is blank. In this instance, because H6 and I5 are now blank, cells AD5 and AD6 ignore I5 & I6 and H5 & H6.</p>
F7:AC7	<p>Notes</p> <p><i>These cells provide space to insert comments relating to the time period in question. For instance, perhaps you have changed the period's target value because of external factors, or perhaps the activity was cancelled for this particular period.</i></p> <p><i>You can leave these cells blank if there is nothing of note to say.</i></p>	<p>In our fictional example, there were no issues of note during program implementation, so you can leave these cells blank.</p>
A17:AI16	<p>Explanation of why indicator is over- or under-target</p> <p><i>Look at cell AD11 – this tells us the rating for the indicator. In this case, we have met our target because we are +/- 10% within the target (AD10 shows us the percentage difference over the length of program, and cells F9:AC9 and F10:AC10 show us the status of the indicator during the program).</i></p> <p><i>Were we above or below target, it'd be necessary to insert an explanation in column AI.</i></p>	<p>No action necessary because we met our target.</p>
A13:AI20	<p>Indicator 2</p>	<p>Now repeat the steps above for the second indicator</p>
Row 23	<p>Assessment Level 3 rating for Intermediate Outcome</p> <p><i>This purple ribbon displays the overall score for the Intermediate Outcome.</i></p>	<p>No action required</p>

Everything is calculated automatically so there is no action necessary here. Cell E23 displays the average score across all indicators under this intermediate outcome, whereas cell G23 shows this average rounded to the nearest 0.5.

See cell AF23 for the final rating. Scores correspond as follows: 0 = Extremely Below, 0.5 = Below, 1.0 = Met, 1.5 = Above or Extremely Above.

In the main worksheet, these scoring ribbons will appear for the other Assessment Levels.

Congratulations! You have successfully completed the Practice Module. Now it's time to understand the overall structure of the workbook.

Step 2: Set-up

- Go to the “Set-up” worksheet
- This page allows you to define the names of your Result Levels, program length and the reporting period of your program.
- **A note on defining your objectives:**
 - When you open the spreadsheet, Results Levels 5, 4 and 3 have been named as follows: Purpose, Sub-purpose and Intermediate Outcome (Result Level 5 and Assessment Level 5 is not included in the 4-level spreadsheet).
 - If your program uses different names, enter them in cells B28:B30 (or B29:B30 in the 4-level spreadsheet). Refer to the table (A36:N42) for guidance on what terminology other donors use.
 - If you have lower-order objectives, such as activities, results or outputs, these should be rolled into their relevant Intermediate Outcomes (or whatever terminology your program uses for these). So, for instance, when filling out your results, if you have an output indicator associated with a certain Intermediate Outcome, use a module underneath this Intermediate Outcome to provide all necessary details. See Annex 1 of this document for a worked example.
 - You can also use the optional blue cells in column B to specify the names you use for lower- or higher-order objectives. The blue cells will not change the spreadsheet in any way, but they can help you to visualize the hierarchy of your indicators.

Cell	Cell description	Action
B7	<p>Specify reporting period</p> <p>Select quarterly if your program is less than or equal to two years and yearly if it is more than two years.</p> <p>Your program will probably have multiple reporting frequencies, such as semi-annual, event or baseline/endline, as well as yearly and quarterly. In each case, modify the results to fit the spreadsheet. For instance, if you selected ‘yearly’ in cell B7 and your program has indicators with results from quarters 2 and 4 of each year – sum them together to create one result for each year. Similarly, if you have baseline and endline results for a particular indicator, insert the results into the first and last year in which the program was active.</p>	<p>Select quarterly if your program is less than or equal to two years and yearly if it is more than two years</p>
B8	<p>Length of program (years, including extensions)</p> <p>Enter the total length of the program, including any extensions. Ensure that you round the</p>	<p>Enter the total length of the program, including any extensions.</p>




	<p><i>number up to the nearest whole number. For instance, if your program is 3.25 years, enter 4 years in the cell. You must enter a number between 1 and 24 (inclusive).</i></p>	
B28	<p>(For the five-level spreadsheet only) Specify Result Level 5 name</p> <p><i>Result Level 5 is the highest Result Level of your results framework, often known by “Goal”, “Purpose” or “Impact”.</i></p> <p><i>For cells B27, B28 and B29 you are welcome to use your own terminology should you wish. Ensure that the terms you use match those in your results framework.</i></p>	<p>Enter a name for Result Level 5</p>
B29	<p>Specify Result Level 4 name</p> <p><i>Result Level 4 is nested under Result Level 5 and often known by “Sub-Purpose” or “Outcome”.</i></p>	<p>Enter a name for Result Level 4</p>
B30	<p>Specify Result Level 3 name</p> <p><i>Result Level 3 is nested under Result Level 4 (and in turn, Result Level 5) and often known by “Intermediate Outcome” or “Intermediate Result”.</i></p>	<p>Enter a name for Result Level 3</p>


Step 3: Entering actuals & targets

Instructions for the 5-level Actuals vs Targets template

Go to the “3a. Result 1” worksheet. This is where you will enter all indicators under your first level-5 result.

As you complete the worksheet, use the accompanying ‘3b. Summary table for R1’ tab to see a handy overview of all the actuals vs targets information you’ve entered.

Cell	Cell description	Action
A1:A193	<p>Modules 1:10 for Result Level 5, objective 1</p> <p><i>You will see two available modules in which you can enter the indicators under Result Level 5, objective 1. If you need more, press the plus  sign in the left-hand column to unhide the remaining eight.</i></p> <p><i>Leave blank any module you do not need. It will not affect the overall calculation.</i></p> <p><i>Depending on the length of your program, you may need to unhide extra columns to enter data for additional reporting periods. In order to do this, click on the plus sign  in the top row to display all additional columns. Alternatively, you can press the numbers 1-6 on the left-hand side of the top row to unhide additional columns in batches of four.</i></p> <p><i>The numbers look like this:</i></p> <div data-bbox="397 1365 430 1543"> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> </div>	Follow the steps in the Practice Module section of this guide to fill out a module for each indicator.
A94:A186	<p>Modules 1:10 for Result Level 4, objective 1</p> <p>Underneath the modules for Result Level 5, objective 1, you’ll see two further modules for Result Level 4 and another eight if you press the plus sign  on the left.</p>	Follow the steps in the Practice Module of this guide to fill out a module for each indicator.
A187:AC281	<p>Modules 1:10 for Result Level 3, objective 1</p>	Follow the steps in the Practice Module of this guide




	Underneath the modules for Result Level 4, objective 1, you'll see two further modules for Result Level 3 and another eight if you press the plus sign  on the left.	to fill out a module for each indicator.
Row 281	<p>Assessment Level 3 scoring ribbon for Result Level 3, objective 1</p> <p><i>This ribbon displays the overall score for Result Level 3, objective 1. Everything is calculated automatically so there is no action necessary here. Nevertheless, the following can help to understand the scoring process:</i></p> <p><i>Cell E281 displays the average score across all indicators under Result Level 3, objective 1, whereas cell G281 shows this average rounded to the nearest 0.5. See cell AF281 for the final rating. Scores correspond as follows: 0 = Extremely Below, 0.5 = Below, 1.0 = Met, 1.5 = Above or Extremely Above</i></p> <p><i>Note that row 281 shows a running average for Result Level 3, objective 1. The final average will only calculate once all relevant indicators have been inputted.</i></p>	No action necessary
A285:AI672	<p>Modules for Result Level 3, objectives 2, 3, 4 and 5</p> <p><i>If necessary, you can enter actuals vs targets for another 40 indicators across Result Level 3, objectives 2, 3, 4 and 5 (all of which are nested under Result Level 4, objective 1).</i></p> <p><i>You won't have anywhere near as many indicators in your results framework, so just leave blank any modules you don't need; it won't affect the overall scoring.</i></p>	Follow the steps in the Practice Module of this guide to fill out a module for each indicator.
Row 674	<p>Assessment Level 4 scoring ribbon for Result Level 4, objective 1</p> <p><i>This ribbon displays the overall score for Result Level 4, objective 1. Everything is calculated automatically so there is no action necessary here.</i></p>	No action necessary
A677:AI3004	All remaining modules	Follow the steps in the Practice Module of this guide

	<p><i>The remaining modules repeat the pattern above. As explained above, each Result Level 4 objective has space for 5 Result Level-3 objectives (each with space for 10 indicators). See Infographic 1 near the end of this document for a full map of the worksheet.</i></p> <p><i>Once again, you won't need anywhere near as much space as this, so just leave blank any modules you don't need; it won't affect the overall scoring.</i></p>	to fill out a module for each indicator.
Row 3007	<p>Assessment Level 5 scoring ribbon for Result Level 5</p> <p><i>This ribbon shows the overall score for Result Level 5, objective 1. It takes an average of every indicator in the worksheet to assign a rating of 'Extremely below', 'Below', 'Met', 'Above' or 'Extremely above.'</i></p> <p><i>Everything is calculated automatically so there is no action necessary here.</i></p>	No action necessary

Instructions for the 4-level Actuals vs Targets template

Go to the “3a. Results 1-5” worksheet. This is where you will enter all indicators under your first level-4 result.

As you complete the worksheet, use the accompanying ‘3b. Summary table for 3a’ tab to see a handy overview of all the actuals vs targets information you’ve entered.

Cell	Cell description	Action
A1:A193	<p>Modules 1:10 for Result Level 4, objective 1</p> <p><i>You will see two available modules in which you can enter the indicators under Result Level 5, objective 1. If you need more, press the plus  sign in the left-hand column to unhide the remaining eight.</i></p> <p><i>Leave blank any module you do not need. It will not affect the overall calculation.</i></p> <p><i>Depending on the length of your program, you may need to unhide extra columns to enter data for additional reporting periods. In order to do this, click on the plus sign  in the top row to display all additional columns. Alternatively, you can press the numbers 1-6 on the left-hand side of the top row to unhide additional columns in batches of four.</i></p> <p><i>The numbers look like this:</i></p> <div data-bbox="397 1270 430 1459"> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> </div>	Follow the steps in the Practice Module of this guide to fill out a module for each indicator.
A94:A186	<p>Modules 1:10 for Result Level 3, objective 1</p> <p>Underneath the modules for Result Level 5, objective 1, you’ll see two further modules for Result Level 4 and another eight if you press the plus sign  on the left.</p>	Follow the steps in the Practice Module of this guide to fill out a module for each indicator.
Row 188	<p>Assessment Level 3 scoring ribbon for Assessment Level 3, Result 1</p> <p><i>This ribbon displays the overall score for Result Level 3, Result 1. Everything is calculated</i></p>	No action necessary

	<p><i>automatically so there is no action necessary here. Nevertheless, the following can help to understand the scoring process:</i></p> <p><i>Cell E188 displays the average score across all indicators under Result 3, Result 1, whereas cell G188 shows this average rounded to the nearest 0.5. See cell AF188 for the final rating. Scores correspond as follows: 0 = Extremely Below, 0.5 = Below, 1.0 = Met, 1.5 = Above or Extremely Above</i></p> <p><i>Note that row 188 shows a running average for Result Level 3, Result 1. The final average will only calculate once all relevant indicators have been inputted.</i></p>	
A192:AI579	<p>Modules for Result Level 3, objectives 2, 3, 4 and 5</p> <p><i>If necessary, you can enter actuals vs targets for another 40 indicators across Result Level 3, objectives 2, 3, 4 and 5 (all of which are nested under Result Level 4, result 1).</i></p> <p><i>You won't have anywhere near as many indicators in your results framework, so just leave blank any modules you don't need; it won't affect the overall scoring.</i></p>	<p>Follow the steps in the Practice Module of this guide to fill out a module for each indicator.</p>
Row 581	<p>Assessment Level 4 scoring ribbon for Result Level 4, objective 1</p> <p><i>This ribbon displays the overall score for Result Level 4, objective 1. Everything is calculated automatically so there is no action necessary here.</i></p>	<p>No action necessary</p>
A584:AI291 1	<p>All remaining modules</p> <p><i>The remaining modules repeat the pattern above, covering objectives 2-5 of Result Level 4. Each of the five Result Level-4 objectives on this worksheet has space for five Result Level-3 objectives (each with space for 10 indicators). See Infographic 2 near the end of this document for a full map of the worksheet.</i></p> <p><i>Once again, you won't need anywhere near as much space as this, so just leave blank any</i></p>	<p>Follow the steps in the Practice Module of this guide to fill out a module for each indicator.</p>

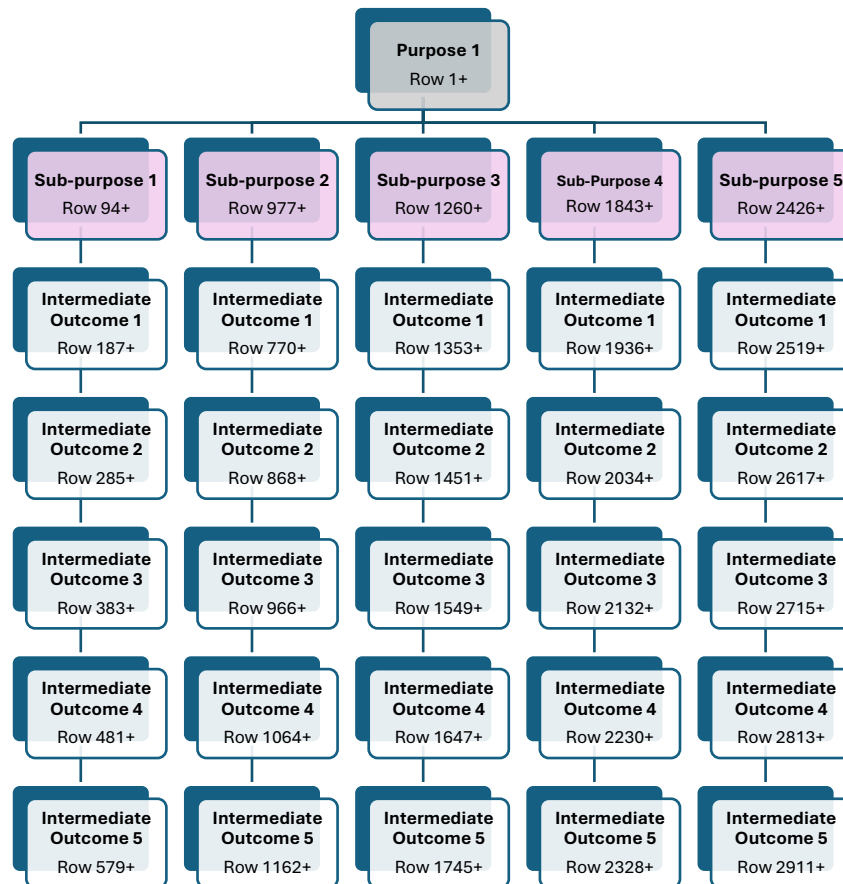
modules you don't need; it won't affect the overall scoring.

Step 4: Completing the rest of the Actuals vs Targets template

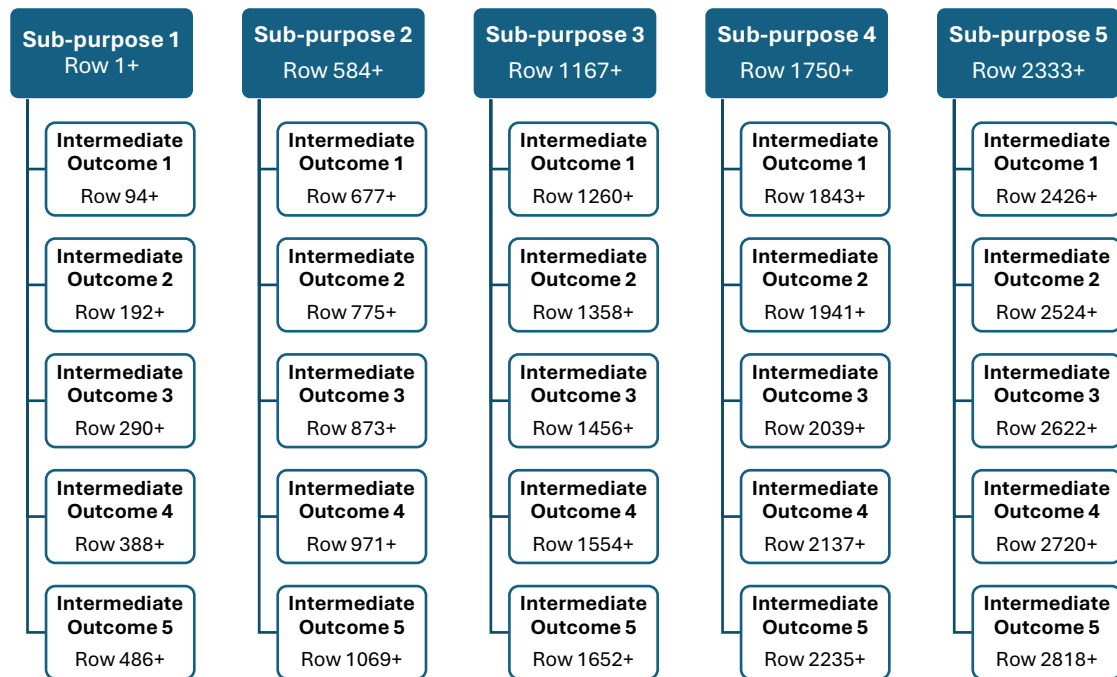
- You can now repeat this process as many times as necessary across the remaining worksheets; there is enough space in this workbook for over 300 indicators! You won't have anywhere near as many indicators in your results framework, so just leave blank any modules you don't need; it won't affect the overall scoring.
- You will also see several worksheets entitled 'Summary table' (tabs 3b, 4b and 5b). These are populated automatically and show you a handy summary of all the information entered. You can also copy and paste these tables into Word documents when writing reports (make sure right-click and select 'Paste Options: Picture' when pasting the tables into Word).
- There are a total of three pairs of worksheets to enter your all of your actuals vs targets information: 3, 4 and 5.
- If you need to create extra worksheets (for instance, perhaps you have more than three Result Level-5 objectives), select both the 'Result' and 'Summary table' tabs together (do this by holding control and clicking), right-click, press 'Move or Copy', check the 'Create a Copy' box, and then click 'OK'. Make sure the 'Result' and 'Summary table' tabs you've copied are numbered the same way (for example, select '3a. Result 1' and '3b Summary table for R1', not '3a. Result 1' and '4b Summary table for R2').
- Below is an infographic to help you understand the structure of the worksheets in the 5-level template (remember, for this example, Result Level 5 = "Purpose", Result Level 4 = "Sub-Purpose" and Result Level 3 = "Intermediate Outcome"). Note that each bubble has 10 indicators attached to it.

Annexes

Annex 1: Structure of the 5-level Actuals vs Targets template (infographic)



Annex 2: Structure of the 4-level Actuals vs Targets template (infographic)



Annex 3: Example of nesting output indicators under an Intermediate Outcome

- Imagine you are running a program to improve school outcomes and that you have defined Intermediate Outcome 1 (IO1) as: 'Increase in monthly attendance across primary schools in region X'
- Then imagine that your first indicator relating to IO1 is: '% increase in monthly attendance across primary schools in region X'. This indicator is at the intermediate-outcome level (in the screenshot below, the 'Indicator 1' module has been used to detail the results).
- You also have several output indicators under IO1, one of which is Output 1: 'No. of community meetings held in region X on the importance of attending school'. Because there are no dedicated sections for outputs in this spreadsheet, you should simply use one of the modules under Intermediate Outcome 1 to detail the results of your output indicator(s). In the screenshot below, the results for Output 1 are detailed in the 'Indicator 2' module.

Intermediate Outcome 1							
Level 3: Intermediate Outcome	Enter Intermediate Outcome number: 1		Result statement for Intermediate Outcome 1:	Increase in monthly attendance across primary schools in region X			
Indicator 1	Metadata question	Response	Baseline value =>	60%	Year 1	Year 2	Year 3
Indicator number under your result framework (enter below):	Is this an increasing indicator?	Increasing	Targets →	65.0%	70.0%	75.0%	
IO1	Number or percent?	Percent	Actuals →	66.0%	69.0%	83.0%	
Indicator name (enter below):	Is this an External (Donor) or an Internal indicator?	External	Notes →				
Increase in monthly attendance across primary schools in region X	(Evaluator-use only) Weighting for this indicator:			1.0	1.0	1.5	
	OOM indicator number (coming soon):		Level 1 (by target period) ==>	MET	MET	Above	
	MC Regional KPI?	No	% difference actual vs target	2%	-1%	11%	
Indicator 2	Metadata question	Response	Baseline value =>	0	Year 1	Year 2	Year 3
Indicator number under your result framework (enter below):	Is this an increasing indicator?	Increasing	Targets →	10	20	30	
Output 1	Number or percent?	Number (non-cumulative)	Actuals →	11	22	35	
Indicator name (enter below):	Is this an External (Donor) or an Internal indicator?	External	Notes →				
No. of community meetings held in region X on the importance of attending school	(Evaluator-use only) Weighting for this indicator:			1.0	1.0	1.5	
	OOM indicator number (coming soon):		Level 1 (by target period) ==>	MET	MET	Above	
	MC Regional KPI?	No	% difference actual vs target	10%	10%	17%	