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| **ADDITIONAL RESOURCE SUMMARY: PROGRESS REPORT REFLECTION MEETING GUIDANCE** | |
| Purpose | This guidance walks you through a process that can be used to help conduct the Reflection Meeting. The purpose of the Reflection Meeting is to gather key project staff and/or partners to review and analyze project implementation data and information, primarily output and outcome indictors, during a reporting period.   * The analysis and reflection is meant to provide a qualitative perspective that explains the quantitative data collected in the ITT and ATT. * The Reflection Meeting follows the key sections in the Project Progress Report, and is therefore very useful to develop the content for the report. * In one Reflection Meeting you can prepare all the information for the entire Project Progress Report!   + The Reflection Meeting Guidance was created with the LWR Project Progress Report in mind, but the concept of the meeting can also be useful for creating reports on projects with restricted funding. |
| Information Sources | **Information the project team should have before starting the Reflection Meeting:**   * Monitoring/field trip reports * Project financial statements (budget versus actual – BVA) * Completed Indicator Tracking Table and Activity Tracking Table for the reporting period * M&E Matrix |
| Who | Key project staff: LWR Country Director, LWR Program Manager, Partner Project Manager, Field Staff, etc.   * Key community leaders, project participants, or other stakeholders add beneficial perspectives and analysis. If time and resources allow, consider including these stakeholders in your Reflection Meeting. * It is often not practical for the LWR PM to participate in every reflection meeting. Nevertheless, if the LWR PM is not available to participate s/he should encourage the partner to complete a reflection meeting for each reporting period. Also, if LWR HQ staff are conducting field visits, even if it is not directly before the end of the reporting period, the LWR PM can request that they conduct a Reflection Meeting with the partners they are visiting to help provide further capacity building and also a different perspective on the reflection. |
| When | It must take place **AFTER** the data for the ITT and the ATT has been compiled and **BEFORE** beginning the Project Progress Report.   * It should take place before the partner submits the Project Progress Report to the LWR country office. * The total time required depends on the size and complexity of the project. As the analysis is focused on analyzing project indicator data, the more indicators the project has, the more time will be required for the Reflection Meeting. |
| Recommendations | * The reflection meeting is not required, but it has been identified as the best and most efficient way to generate the content for the Project Progress Report. * **The amount of time to conduct the Reflection Meeting will be reduced after the first few times you conduct it with a new team or for a new project. As participants get used to the process it will be completed much more quickly.**   + Small projects can possibly complete it in 2 hours, whereas large projects may require an entire day. A recommended duration for most projects is about a half day, usually 4-5 hours. * It is recommended that all the relevant project documents (field visit reports, monitoring reports from HQ, previous Project Progress Reports, etc.) are collected before the reflection meeting. Having the documents available during the meeting can help answer questions and provide deep or more relevant analysis of the project. |
| Tips | * The reflection meeting is an opportunity to step back and look at the project from a more macro perspective. Enjoy the opportunity as it is difficult to make time for this activity at other times. * It is a good complement to regular field visits conducted by the PM as it allows him/her to share field visit observations and insights that can help clarify the successes and challenges that are identified during the meeting. * Keep in mind the goal of the project during discussions and analysis * Focus the majority of the analysis on output and outcome indicators: are we making progress towards the big picture things we want the project to achieve? How is the work from the last quarter getting us closer to real change, real impact? * Select and prioritize the most important accomplishments and most demanding challenges to include in the Project Progress Report * Focus the analysis of activities primarily on how they relate to progress and their relation to achieving the outputs. Avoid analyzing specific tasks related to accomplishing activities unless the success or challenge in doing that task had a major impact on the completion of the activity. |
| Gender Considerations | A project that meets the LGI standards for gender integration at this stage will undertake all of the following:   * Examine indicators to identify where there are significant differences in men’s and women’s participation and performance in activities. * Reflect upon how different challenges and successes of men and women appear in the project. * Prioritize gender-related challenges that need to be addressed and identify mid-course corrections. * Identify lessons learned about gender-relate successes or challenges. |

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| **REFLECTION MEETING OUTLINE** | | |
| **Key Activities** | **Section of Project Progress Report** | **Steps** |
| 1. Complete the Indicator Tracking Table (ITT) and Activity Tracking Table (ATT) | ITT and ATT | 1. Compile the actual data from all components of the projects and fill in the “actual column” of the ITT for the reporting period. 2. Check to make sure all the formulas are correct and double check that the data has been entered correctly. 3. Enter the current beneficiary data according to the definitions given the Project Progress Report Guidance document (Section 1) |
| 1. Document and analyze overall project successes and challenges. | **Section 3.1:** Analysis of Implementation: *Goal Summary* | 1. Write each project outcome on a piece of flip chart paper. 2. Hand out two colors of sticky notes and ask all staff to write challenges for each outcome on one color and successes on another color. 3. While the comments are being placed on the flipchart the facilitator can begin clustering similar comments. 4. Finalize the key successes and challenges by summarizing the main challenge or success represented by each cluster. 5. Write the summary of the cluster directly on the flip chart paper near the cluster. 6. Discuss with the entire group the finalized clusters. Orient the discussion around how each cluster affects the project’s work towards achieving its GOAL. Make sure that one person is in charge of taking notes during this step.   *Key Considerations:*   * + Does everyone agree on the main content of the clusters?   + Does anyone have anything to add who did not originally provide a comment on that cluster?   + Are there any comments that were not in a cluster? Are there outliers that are not as important or do they need further analysis?   *Key Questions:*   * + Reflect on the causes of each of the clusters (both challenges and successes). What are they?   + Are any of the clusters linked? If so, do they have similar causes?   + Look at the causes of each of the successes clusters. Can any of these causes be documented as key lessons learned for the project or are they primarily expected results?   + Look at the causes of each of the challenge clusters. Identify which challenges need to be immediately addressed and determine with the group the best action to take.   + Do any of the clusters contradict each other? Is there a success cluster that is the opposite of a challenge cluster? What does that mean for the project? Does it show that there are different experiences in different areas where the project is being implemented? How can the successes in one area help to address challenges in another?   + Reflect on the previous reporting periods. Are any of the challenges identified during this reporting period similar or the same as challenges from previous reporting periods? How are these stubborn challenges affecting project progress and overall achievement of our goals? Does more effort need to be given in solving these challenges or are the challenges of low impact and should just be monitored?  1. The note taker should summarize the key conclusions of the discussion to ensure that the notes were taken correctly and allow for any further final comments. 2. These steps should be completed for all project OUTCOMES. 3. If it is determined it is a key lesson learned, document it in Section 3: Goal Summary of the Project Progress Report |
| 1. Analyze project success based on OUTCOME indicators and their targets. | **Section 3.2:** Analysis of Implementation: *Outcome 1: Analysis and Reporting* | 1. Open the ITT so that you can view all project indicators. 2. Look at the % of target for each OUTCOME indicator.    1. If the indicator target was met, were there any important factors that helped the project team meet that target?    2. If the project exceeded the indicator target, revisit the successes identified in the last section. Did any of the successes help you accomplish the target for the indicator? If so, list them as a key accomplishment. Identify other successes that were key in exceeding or meeting indicator targets for the period.    3. If the indicator target was not met, revisit the challenges identified in the last section. Did any of those challenges contribute to not reaching the target? If not, identify as a group which challenges did.    4. Review each indicator for its progress towards the annual targets and life of project targets. If the target was not met for this reporting period, will the project be able to make up this difference to meet the annual and/or life of project targets? 3. When finished analyzing all OUTPUT indicators (in the following section), reflect on the current progress of ALL the OUTPUTS and how that relates to achieving this OUTCOME.    1. Are all of the OUTPUTS progressing as planned? If so, is this reflected in the achievement of the OUTCOME indicators?    2. Is progress towards achieving one OUTPUT significantly lower than the others? If the targets for this indicator are not met, will it affect the achievement of the OUTCOME indicators? Can the project still reach its desired impact? |
| 1. Analyze Project progress based on OUTPUTS | **Section 3.2:** Analysis of Implementation: *Outcome 1: Analysis and Reporting* | 1. Look at the % of target for each OUTPUT indicator.    1. If the indicator target was met, were there any important factors that helped the project team meet that target?    2. If the project exceeded the indicator target, revisit the successes identified in the last section. Did any of the successes help you accomplish the target for the indicator? If so, list them as a key accomplishment. Identify other successes that were key in exceeding or meeting indicator targets for the period.    3. If the indicator target was not met, revisit the challenges identified in the last section. Did any of those challenges contribute to not reaching the target? If not, identify as a group which challenges did.    4. Review each indicator for its progress towards the annual targets and life of project targets. If the target was not met for this reporting period, will the project be able to make up this difference to meet the annual and/or life of project targets? 2. When finished analyzing all the ACTIVITIES for each OUTPUT (in the following section), reflect on the current progress of ALL the ACTIVITIES and how that relates to achieving this OUTPUT.    1. Are all of the ACTIVITIES progressing as planned? If so, is this reflected in the achievement of the OUTPUT indicators? 3. Are the ACTIVITIES for one OUTPUT significantly behind schedule or of lower quality than the others? If those ACTIVITIES are not completed or the targets are not met, will it affect the achievement of the OUTPUT indicators? If it affects the achievement of the OUTPUT indicator, how will affect the achievement of the OUTCOME indicators? Can the project still reach its desired impact? |
| 1. Analyze project progress based on ACTIVITIES | **Section 3.2:** Analysis of Implementation: *Outcome 1: Analysis and Reporting* | 1. Reflect on the quality of all the activities by asking participants to bring up any major issues with quality that they have encountered for all activities linked to the OUTPUT.    1. Even if the activity target was met, were there any issues with participation or the quality of the activity? Did participant surveys show they were satisfied with the activity? Which issues contributed to their satisfaction/dissatisfaction?    2. Was an activity particularly successful in one community versus another? What factors contributed to that success? (better trainers, more time allocated to the activity, better pre-planning, more community involvement, more support from local community leaders)    3. Are any of the quality issues identified affecting the quality of the OUTPUTS?    4. Report only on key quality issues, focusing on those that have the potential to affect the achievement of the OUTPUT. Those that affect achievement in a positive way should be included in KEY ACCOMPLISHMENTS while those that affect achievement in a negative way should be included as KEY CHALLENGES. 2. Review the ATT and identify which ACTIVITIES met or exceeded their targets during the reporting period. Note the activities that have met or exceeded their targets for the reporting period in the KEY ACCOMPLISHMENTS section of the Project Progress Report, but do not provide further details unless there is a KEY ACCOMPLISHMENT.    1. Were more activities completed than were planned? What factors allowed more activities to be completed than originally planned?    2. Were there any unplanned activities that were completed? 3. Identify any actions that can be taken to use the successes identified either during the project or for LWR as an organization. 4. Identify which ACTIVITIES did not meet their target during the reporting period. Note the activities that have not met their targets for the reporting period in the KEY CHALLENGES section of the Project Progress Report, but do not provide further details unless there is a KEY CHALLENGE.    1. Were there any issues with attendance? Was it higher or lower than expected?    2. What contributed to any delays in activities? (Weather, religious holidays, security concerns, lack of materials, etc.)    3. Are certain communities or areas experiencing particular difficulty in completing the target number of activities? What is this due to? Do resources or expertise need to be shifted from better performing areas to assist in underperforming ones? 5. Identify any actions that must be taken to address the challenges identified in step 4. 6. After analyzing the quality and progress of all the ACTIVTIES for each OUTPUT, assess how the overall progress of activity implementation affects achieving the OUTPUT indicators. |
| 1. Review the project’s financial status and how it relates to Project progress. | **Section 4:** Financial status | 1. Obtain the project’s most current financial summary, normally in the form of a Budget Variance Analysis (BVA) report. 2. Review the project’s overall progress versus the total project budget and the project budget spent until the current reporting period.    * Overall, has the project spent more or less than what was planned until this point in the project?      + Remember the project budget should be linked primarily to the completion of activities. The completion of activities, and therefore budget spent, does not always correspond exactly with the timeline of the project. For example, a project of 3 years that is halfway complete (1.5 years) may have spent 60% of its budget because more activities happen in the first half than the second half of the project. 3. If the project has spent more or less than planned, identify which activities contributed to the variance.    * If the activity is over-spent, what must happen? Will the number of planned activities in the future need to be reduced? Can costs be cut in other ways in order to complete all activities? Can we ensure the quality of future activities if costs are cut?    * If the activity was underspent, explore why? What specific activity costs were lower than expected? Does the budget savings need to be saved for future activities or can it be used in other areas of the project? 4. Determine what actions must be highlighted for LWR’s finance team to ensure that the project has sufficient resources to implement all of the proposed activities in the next reporting period. 5. Consolidate all the analysis and report generally on the financial status of project in **Section 4: Financial Summary** in the Project Progress Report. |
| 1. Identify key management and administrative issues. | **Section 2:** Key management and administrative updates | 1. Management and administrative issues are often identified during the analysis of Outcomes, Output and Activities indicators in steps 1-5. They include issues such as everything from human resources (HR), to security, to partnership/accompaniment issues, and reviewing project assumptions. They answer such questions as:  * Were key staff hired or fired? * Were there any issues with understanding policies and procedures outlined in the project agreement? * Were there any issues with the partnership between LWR and the partner? * Do the assumptions made about the operating environment originally identified in the project proposal still hold true?   + Has the security situation changed? Has it gotten worse and therefore affected project implementation? Has it improved and therefore reduced the time or budget needed to implement the project?   + Were there any major natural events (earthquakes, hurricanes, drought, flooding, etc.) that were unexpected and affected the long-term feasibility of the project?  1. Identify any major management and administrative issues as outlined about and report them **Section 2: Key management and administrative updates** of the Project Progress Report. |