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| **TOOL 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 | 1. Monitoring/field trip reports 2. Project financial statements (budget versus actual – BVA) 3. Completed Indicator Tracking Table (ITT) and Activity Tracking Table (ATT) for the reporting period 4. M&E Plan 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. |

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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 all the actual data from all components of the projects and fill in the “actual column” of the ITT for that 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 data in the “actual column” of the ATT. Make sure that the summary totals are correct in the row “ACTIVITY PROGRESS SUMMARY” and that it is linked correctly the related “ACTIVITY PROGRESS SUMMARY” rows in the ITT. 4. 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:** 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? **If it is determined it is a key lesson learned, document it in *Section 3: Goal Summary* of the Project Progress Report**   + 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. **If it is determined it is a key lesson learned, document it in *Section 3: Goal Summary* of the Project Progress Report**   + 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. |
| 1. Analyze project success based on project indicators and their targets. | **Section 3.1:** Analysis of Implementation: *Outcome and Outputs* | 1. Identify which indicators, both outcome and output, that had significant variance (usually **+/- 25%** of the target). 2. Present each indicator with a significant variance to the group. 3. 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. Revisit the successes identified in the last section. Did any of the successes help you accomplish the target for the indicator with a positive variance? If so, list them as a key accomplishment. Identify other successes that were key in exceeding or meeting indicator targets for the period.    * Is progress on one output indicator significantly lower than the others? If the target for this indicator is not met, will it affect the achievement of the Outcome? Can the project still reach its desired impact? 5. 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? |
| 1. Analyze project progress based on activities | **Section 3.1.a:** Analysis of Implementation: *Activities* | * 1. Review the ATT and identify in the “Activities Progress Summary” any groups of activities that had significant variance (usually **+/- 25%** of the target).   2. Identify which activities contributed the most to the variance and discuss why those activities faced challenges or what contributed to their success. Focus particularly on how the variance of the completion of the activity can affect reaching the target for the Output.   + Were there any unplanned activities that were completed?   + Were there any issues with attendance? Was it higher or lower than expected?   + What contributed to any delays in activities?     - Weather, religious holidays, security concerns, lack of materials, etc.   + 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?   + 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   + Were more activities completed than were planned? What factors allowed more activities to be completed than originally planned?   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.   + 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?   + Are any of the quality issues identified affecting the quality of the outputs?   + Report only on key quality issues, such as ones that have the potential to affect the achievement of the Outcome.   1. Based on the analysis of meeting activity targets and analyzing the quality of activities, identify the key accomplishments and challenges from the discussion for each group of activities linked to the output and **identify actions that must be taken to address the challenge or make the most of the accomplishment.**   + Transfer the re to the Project Progress Report, keeping in mind that only KEY accomplishments and challenges should be reported. |
| 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 effected 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. |