**Tool B3 (outcome 2) – M&E evaluation report guidance and lessons learned feedback sessions**

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| Monitoring and evaluation report guidance |

Monitoring and evaluation reports highlight key information to inform programme management for quality performance and accountability, as well as provide information for other external reports for accountability and advocacy (e.g., donor reports). This is the programme’s primary reporting mechanism and compiles information from various sources (e.g., activity records, monitoring visit reports). Reports are compiled on a regular basis, such as quarterly or defined by reporting requirements of the NS or programme donor.

The following main headings for a monitoring and evaluation report are adapted from the IFRC M&E Guide (2011) and are provided as guidance for topics you may want to include in your reports.

1. **Identifying information:** date, name of person compiling report, location, title of programme, etc.
2. **Programme information:** reporting period dates, programme start and end dates, name of the programme manager, location, etc.
3. **Executive summary**: summarize key points from other sections of the report. Provide a snapshot overview of the programme’s current status – whether the programme is on track, total people reached during the reporting period, key accomplishments and problems or challenges. Include key actions planned to address any ongoing or new issues and to support programme implementation.
4. **Financial status:** a concise overview of the programme’s financial status based on the monthly finance reports for the reporting quarter.
5. **Situation/context analysis (positive and negative factors):** discuss any factors that affect the programme’s operating context and implementation (e.g., change in security or a government policy, etc.) as well as actions to be taken.
6. **Analysis of implementation:** providean analysis based upon the objectives as stated in the programme’s logframe and data recorded in the programme’s indicator tracking table. Be sure to:

* Elaborate on what has happened in the programme.
* Relate quarterly performance to overall targets for the year and the life of the programme.
* If no activity was taken for a specific objective during the reporting period, explain why.
* Keep it as simple and short as possible.

1. **Stakeholder participation and complaints:** concisely describe how key stakeholders, particularly local beneficiaries, have been involved in the programme and summarize any key stakeholder feedback (especially complaints).
2. **Partnership agreements and other key actors:** list any programme partners and types of agreements and status/comments (e.g., roles and responsibilities in an MoU, date the agreement is signed).
3. **Cross-cutting issues:** discuss activities undertaken or results achieved that related to any cross-cutting issues, such as gender equality.
4. **Programme staffing – human resources:** list any changes in programme staffing (e.g., new hires) highlighting any implications for the programme implementation and if management support is needed to resolve any issues.
5. **Exit/sustainability strategy summary:** summarize overall progress towards the exit strategy and eventual continuation of the programme objectives after handover to local stakeholders.
6. **PMER status:**  provide a concise update of the programme’s key planning, monitoring, evaluation and reporting (PMER) activities. For example, summarize key activities planned, their timing and status (completed, in process, planned).
7. **Key lessons:** highlight key lessons and how they can be applied to this or similar programmes in the future.
8. **Report annex:** attach the programme’s indicator tracking table and any other useful supplementary information (e.g., ToR’s, case studies, relevant reports).

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| Lessons learned feedback session report guidance |

Periodically, it is useful for the implementing team to review and compile lessons learned from the design and implementation of a programme in the specific context. Feedback sessions to document lessons learned can gather a range of information about the programme and should foster open dialogue and allow for a broad range of opinions. However, it may also be useful to structure the conversation with some guiding questions or topics, such as:

* What went well in implementing this programme (e.g., needs assessment, consultation with beneficiaries, engaging stakeholders, etc.)?
* What were the challenges encountered in implementing the programme?
* What factors in the context influenced how the programme was implemented, its quality, accessibility and reach?
* What was the general impression of beneficiaries who participated in the programme?
* What changes did the programme bring about in terms of PSS for beneficiaries?
* What could we have done differently to improve design or implementation of the programme?
* What did we learn in this programme that we will be sure to carry into other programmes/activities?
* What did we learn in this programme that we should avoid doing in the future?
* What were unexpected or unintended outcomes (positive or negative) of the programme?

Key reflections gathered during a lessons-learned feedback session can be summarized into a written report. The report should contain identifying information such as the date, location of the session, names and positions/role of participants in the meeting, title of the programme or activities, and any other important information about the programme itself (e.g., areas where it is implemented, objectives and target population). The reporting format can then be adapted according to the main questions and themes that have been discussed during the lessons learned session. Finally, key conclusions and recommendations for future action can be listed.