CanWaCH
Canadian Partnership for
Women and Children's Health

CanSFE
Partenariat canadien pour
la santé des femmes et des enfants

Post-Webinar Report: International Assistance Results Reporting Guide for Partners
December 11th 2019
Report on CSO questions

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Background

The webinar took place on December 5, 2019 from 2:00 PM - 3.30 PM EST. Global Affairs Canada representative Caitlyn Hyndman gave a 45 minute presentation followed by a 45 minute question and answer period. A total of 225 individuals registered for the webinar.

An estimated total of 166 people joined the webinar with an average of approximately 155 people throughout. Notices were sent from a few participants that they were unable to attend due to last minute meetings.

This *post-webinar report* is meant to be used as a complement to the *pre-webinar report*[1] to inform Global Affairs Canada on the feedback and questions received by participating organizations.

The present report is a comprehensive consolidation of all questions received about the webinar from the participants. It is divided into three sections: 1. Questions received prior to the webinar, 2. Questions received during the webinar; and 3. Additional questions received after the webinar via the online survey for Global Affairs' reference.

[1] Please email Caitlin Reid for a copy of the pre-webinar report: creid@CanWaCH.ca.

Questions received prior to the webinar

The following questions were received prior to the webinar and were addressed during the webinar by Global Affairs Canada. Questions as submitted by the participants are shown below (The information was gathered via an online survey prior to the webinar).

English respondents' questions

1. If we could simplify the reporting structure, what are the required/priority sections vs the ones that are "nice to have"?
2. How flexible is Global Affairs with the format used? (E.g. can we add the PMF as an attached excel file?)
3. For components such as gender and environment, which are not always captured sufficiently by the PMF but yet are critical to the project, where should we report these?
4. How often do we need to include more details about cumulative results to date?
5. How flexible is Global Affairs to let projects adapt the structure of the report based on the context (number of countries where programming is taking place or focusing on different thematic areas)?
6. Many projects, as per terms in the contribution agreement, are not expected to submit semi-annual reports. So should they follow the lead of the Global Affairs officer and follow a reporting structure that works for Global Affairs and also fits the context in the project? How is the updated reporting guide in line with an organisation's contribution agreement with GAC? Both documents are asking for different information - which ones does an organization use?
7. Would there also be similar guidelines on project implementation plans and annual work plans that would allow faster standardization/consolidation especially for multi-country, multi-year projects?
8. Will there be training or technical support in the beginning on how to use the reporting template? Will Global Affairs allow for the reallocation of funds to orient field partners to use the new template?

French respondents' questions

1. Comment faire la mise en oeuvre d'un projet (PIP)? Comment élaborer des budgets qui tiennent compte de toutes les exigences de l'AMC?

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Questions received during the webinar

Questions addressed

The questions shown below were received and addressed during the webinar. Questions are written as submitted by the participants during the webinar.

1. How does this project management and monitoring speak to the increasing recognition of principles of Complexity (which tend to require different M&E approaches.)

2. Does the annual report include an Operation report report as appendix? What is the frequency of that reporting, every 6 months? Or only for April-Sep reporting period?

3. The Annual Report doesn't ask about program governance and management/ administration (even though this is part of the Annual Work Plan). Should it be included?

4. You seem to be asking for two different versions of the PMF (i.e. PMF and Outcome Reporting Worksheet). Is there an opportunity to streamline (i.e. to add additional columns to the existing PMF, rather than asking us to save the file as a different document and reformat)?

5. It would be helpful to understand Global Affairs' interest in always having baseline data within 90/120 days of the Contribution Agreement being signed, as this seems to pose a lot of challenges for partners and its not clear why they need it so quickly.

6. Pourquoi inclure des progrès sur le résultat ultime annuellement? et pourquoi on ne rapporte pas sur les résultats immédiats?

7. Can you please clarify the 'progress towards' (especially for immediate outcomes vs. duplication of output/activity reporting)?

8. Do you have examples of good theory of change, reporting at intermediate outcomes level, stories of change, etc.?

9. Same as Question 8.

10. It is challenging to report annually at the immediate and intermediate outcome levels on a population basis during the years between assessment (e.g. year 2 in a 4 year grant or the year before the final evaluation.) What suggestions do you have for partners, as this reflects an evaluation issue that then impacts the ability to report?

11. Is there a page limit for any of these reports?

12. For blended finance related projects, RBM frameworks (e.g. LM and PMF) are less relevant. How to address that issue given the increased GAC focus on impact investing/blended finance going forward.
    a. Further to that comment, with multiple funders, it is ideal to have integrated reporting. Any comments?

13. When is it appropriate to start completing the outcome reporting worksheet, first year?

14. Just a question on reporting on ultimate outcome...wondering if the guidance on this has changed vis-à-vis attribution vs contribution and expectations for measuring and reporting?

15. Hello, thank you for making these tools much clearer and easier to use! Kinaki (www.kinaki.ca) is our MEL tool, that can easily generate reports based on these GAC templates from project data. My question is, can data be submitted in Excel, or even better, is there a chance that the GAC Officer could review and provide feedback on the reporting results directly in Kinaki together with the submission of reports in Excel?

16. There is a lot of different guidance coming from desk officers on how to use this template. This leads to two burning questions:

    a. What do we do with the Results Report when there is no measurement in the PMF for that year? From some officers we have been told to submit with all sections N/A. While other officers have asked us to just write progress towards all immediate outcomes by talking about outputs. However I think this defeats the purpose of separating Operations & Results (as per the common mistakes section of this presentation. Is there any guidance you can give on this?

    b. Is there an in-depth training to Desk Officers? Are you receiving feedback and updating the template based on feedback? This presentation is identical to the one I watched in 2018.

17. Are charts and graphs allowed to present progress on outcomes in addition to the narratives and tables?

Questions not addressed

The questions shown below were received during the webinar, however due to time constraints, were not covered during the webinar. Questions are written as submitted by the participants during the webinar.

1. Based on the response provided the PMF is only added as an annex if modified during the reporting period. The PMF is actually the same as the worksheets (just split in two). Adding in a column for results and one for variance, would satisfy this. Most project officers are okay with this. Is this still okay to do?

2. Will there be a move to use this format as standard across all contribution agreements, regardless of the branch?

3. Could GAC please provide a best practice completed example of each report?

4. It would also be helpful for understanding the expected level of detail to appear in this new table form of data presentation.
   a. Building that point - are there quality standards that GAC could share to inform what is considered as best practice in reporting, case in point Stories of change or first year reporting on outcomes.
   b. Will financial reporting be covered or it's only for the technical side?

5. We have been asked by Project Team Leads in different branches to adapt the format. Some examples of changes we have been asked to make include: Including a section on budget variance; combine the Outputs and Activities Worksheet with the Outcomes Worksheet; to add a column for the baseline to the Outputs and Activities Worksheet. Just to note this feedback from GAC branches during use of the guidelines.

6. The outputs and activities reporting worksheet asks for annual targets from the annual workplan—but the guidelines we have in our contribution agreement for the PIP and Annual Work Plan don't require annual targets.

7. It would also be helpful if the contribution agreements referred by name to the specific reporting format to use at which points during the project.

8. Are these requirements meant to start with new contribution agreements, or starting now in all reporting?

9. Is there any difference in how these reports are used in single-country vs multi-country projects? Does GAC want all results under one same outcome amalgamated into one paragraph/response for the project, or broken down by country?

10. By analysis of data, you are referring to the interpretation of results and factors leading to positive or negative changes?

11. For both the annual results report and the final project results report, REACH section, are partners expected to report on both reach within the reporting period and cumulative reach to date?

12. Regarding activities and outputs reporting in the annual reports, are we reporting cumulative inception-to-date or only a compilation of first and second semi-annuals?

13. The report guidelines also state that each project is contributing to a particular corporate level indicator which will be communicated to partners. When will that happen?

14. Commentaire sur la version française du guide: Il existe plusieurs coquilles dans le document (ex. Feuille de travaille ...) (Il serait bien de corriger ses erreurs).

15. For multi-country projects - is there any expectations for aggregation across all project countries (in Outputs/Outcomes) or is it sufficient to report each country separated in the report?

16. Just a comment—there needs to be a timely discussion between program implementers and independent evaluators/consultants on how updated GAC reporting requirements/guidelines would affect/change reporting of evaluation findings by evaluation team.

17. Targets are referred to statically throughout this guide, which is fine for outputs, but I'd suggest including some language on target setting for outcomes, as this can be a challenge at project inception without both a baseline and a secondary set of data. Language on GAC's understanding of attribution and how to incorporate attribution into results reporting would also be useful.

18. It's common that project staff changes throughout the lifetime of a project. Do you conduct webinars/training like this frequently, so new staff can attend?

19. It would be truly helpful if GAC could provide us with concrete guidance, e.g. checklists, tables, etc. showing what is considered optimal-desirable vs. not-optimal or not desirable criteria or content to consider as we prepare materials to inform the requirement for anecdotal evidence, i.e. Stories of change. It would help us calibrate our efforts to produce adequate narrative (qualitative vs. anecdotal products) . Thank you!

20. But you're asking to report on it in the template...can you clarify? re: Ultimate Outcome?

21. Can PTLs ask partners to add sections to this standard report if they feel there is information missing? Can partners add sections?

22. Further to the earlier question on misalignment between PMF frequency and annual reporting requirements, the report suggests that partners should make investments in annual outcome reporting. For many indicators, this monitoring data is not directly comparable to baseline data, as methodologies differ, and it is poor practice to make direct comparisons - but the guidelines specify that comparisons to baseline must be made. What is your guidance on this issue?

23. Does this report guide replace the Risk Register? There is no mention of it in the guide.

24. Would GAC make annual and final reports of supported projects available to the general public?

25. Would you consider an Executive Summary with the Annual Report?

26. The list of questions you are receiving from all of us today are very good. Any chance you could send us your responses in writing, to help us in our discussions with our GAC counterparts?

Additional survey responses

The following questions and feedback were received after the webinar via the online survey. A total of 9 new responses were received, all in English. All text is shown as submitted by respondents.

Feedback on clarity of the Reporting Guide

1. The focus on developing evidence-based annual reports encourages focused analysis on or towards results (instead of simply outputs) and eliminates the need for operational reporting within the same annual report. This is more straightforward, and the guideline serves as a useful tool to guide the report content/analysis in a focused way. Additionally, the guidelines removed some of the redundancy within activity reports. That being said, while the guidelines clarify GAC's expectations with regards to report content, and are easy to understand and follow for Canada-based staff, they are not as easily understood or utilized by staff based in Country Offices/ implementing countries. The guidelines cannot be shared as is; they require simplification and adaptation in order to be utilized by field teams, which is a time consuming exercise. It would therefore be helpful to develop guidelines that include simplified descriptions and details for each section within the reporting templates (annexes) themselves.

2. Appreciate the focus on brevity, using the worksheets to inform the narrative, and adding stories of change. Our organization has been doing this for years, so that is good validation for us.

3. It was very clear.

4. It does encourage better reporting. Implementing will be easier if examples are used.
5. It will ensure accountability and motivate staff.

Feedback on level of difficulty of the Reporting Guide

1. There are ongoing projects for which these guidelines have been used, without issue; while information is presented differently, similar information is collated and presented as was done previously. That being said, reporting on gender equality, human rights, environmental sustainability and innovation in a "fully integrated manner" in the narrative, as requested in this guideline, can be challenging; it is sometimes easier to highlight these respective sections as was the case with previous reporting guide(s), for easier reading and assessment. Additionally, outcome reporting with the suggested frequency can be challenging: this is dependent on the planned frequency of data collection and progress of implementation, and so it may not be possible in each reporting cycle to provide actual data on outcomes. While the guideline does acknowledge this for Year 1 (i.e. that immediate outcome results may not be available), the expectations may still not be aligned with the stated frequency in the PMF. Generally speaking, strong M&E capacity and analytical skills are required to fully implement these reporting guidelines, especially when required to complete all annexes (i.e. outcome reporting worksheet, output and activities reporting worksheet, etc.).
2. We generally lack capacity in the field.
3. Guidance is good, appreciate the focus on RBM
4. It was very easy and well described.
5. A lot of tools that captured mostly the same information.
6. We will have to train a number of staff on the new reporting requirements.
7. We have the systems and approach for collecting outcome data on annual bases in place.

Feedback

1. It is helpful that there is a distinction made between semi-annual reports (focused on project operations) and annual reports (focused on project results), which helps to focus the analysis on results; and integration of stories of change, linked to outcomes, also help to illustrate change. It would be helpful to see examples of reports that integrate gender equality, human rights, environmental sustainability and innovation in a fully integrated manner in each section of the report, as requested in the guidelines. Additionally, it is interesting to note that the requirement to integrate reporting on various thematic areas within the narrative is also contrary to the issues listed in Section 2.1 (a) "Common problems in outcome reporting." It is important to note that particularly in Year 1 of projects, the annual reporting template may need to be adapted to reflect the progress made and information available - when slow start up occurs, there may not be sufficient information available / progress achieved to fully utilize the report template. This is particularly challenging in relation to outcome data for the narrative reporting, as requested in the guidelines on "progress on or towards expected outcomes." In order to have outcome data available beyond the customary frequency in the PMF (i.e. baseline, midterm, endline), there will be a greater burden on outcome monitoring and this will require additional human and financial resources.

   2. Please share with everyone with concrete examples.

   3. I understand that the reports should be clear and concise. Innovative data visualization and presentation using charts and interactive templates should be encouraged.

Questions

1. Is the risk register still a priority?

Additional information, tools, training, or resources

1. None identified at this time, though it will be important to ensure that partners / projects have sufficient M&E resources to ensure collection of outcome data, stories, etc. to meet the expectations of these reporting guidelines.
2. More webinars like this, super helpful.
3. RBM.
4. PowerPoint Presentations to cascade the training to our field implementers.