How well are we doing?
What are we learning?
How can we improve?

Partner Reporting Guidelines

December 2021
Reporting is only useful if it informs learning, adaptation and ultimately improved results, and in doing so is utilised by the partner and foundation together.

The guidance provides appropriate direction to assist partners in answering three key questions that are critical to their mission(s) and the foundation:

1. How well are we doing?
2. What are we learning?
3. How can we improve?

The guidance operationalises and builds on the M&E Minimum Requirements which detail roles, responsibilities and ‘must have’s’ and ‘nice to have’s’. The content of the Learning Reports will be used to improve the quality and impact of Laudes Foundation’s programming.

Reporting is divided into two stages:

1. **Monitoring Reporting is conducted by the partner** and is part of the measurement function that provides an assessment of the quality of design and implementation *inter alia* and progress towards outcomes (early and later changes) using mutually agreed rubrics based on appropriate evidence (qualitative and quantitative), that is where necessary and feasible, disaggregated for gender, sex and socio-economic background.

   Monitoring reporting is applicable for all initiative grants **above €100K** that report using rubrics. Initiative grants **less than €100K** are not required to submit monitoring reports or use rubrics and only need to submit an end-of-initiative Learning Report.

2. **The end-of-initiative Learning Report that is conducted by the partner.** The learning report has many benefits for partners, Laudes Foundation and future initiatives:
   
   - Encourages transparent reporting of results and accompanying explanatory factors;
   - Highlights challenges encountered, including how these were overcome and those which remain to be addressed in the future;
   - Distils lessons learned and recommendations to guide improvement for the partner and future foundation initiatives;
   - Gives partners influential information to report to current or potential funders.

   All partners (with any initiative grant size) are required to submit an end-of-initiative Learning Report.

   Co-funded initiative grants more than €100K, where the foundation is joining existing funders will submit reports aligned with those funders. However, the reporting will include rubrics.
Monitoring Reporting

It is conducted in accordance with the rubrics selected for grants more than €100K and time schedule outlined and agreed by the partner and Laudes Foundation in the proposal and grant contract. Monitoring reports should be better 3–6 pages in length (excluding annexes) and be discussion and thought-starters between the partner and Programme Manager.

Each monitoring report shall provide information / responses to the following questions:

1. **Cover sheet**: Initiative title; organisation legal name, geographical reach of the initiative total grant value; co-financing' expected and realised; grant award date and end date;

2. **Summary of key achievements**: Briefly point out the key achievements in the last six months;

3. **Initiative quality snapshot**: Partner self-assesses the initiative grant performance with a rubric-based rating of (see Annex A):
   - Design
   - Implementation
   - Monitoring
   - Communication and learning
   - Organisational and network capacity

   With a short justification, and the change in rating, if applicable since the previous report period.

   **The periodicity of the rating will be twice per year, based on a six month cycle from the beginning of the initiative grant.**

4. **Outcome situation snapshot**: Partner rates the current situation where they are intervening for each relevant rubric related to early and later changes and outcomes (see Annex B). For example, the following rubrics:
   - B1: Right processes for stronger policy reforms
   - B5: Exposure of harmful practices
   - C1: Policymaker progress on relevant reforms

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1 Co-financing is defined as financial or in-kind resources that are additional to the foundation grant and directly support the implementation of the initiative and achievement of results committed at approval. Types of co-finance are: grants, loans, equity investments, committed in-kind support.
Each rating is provided with a short justification, including any changes in rating since the previous report and partner contributions to aforementioned changes.

The periodicity of the rating will be once per year, from the beginning of the initiative grant.

5. **Key Questions and Lessons Learned**
   - What is working well and why? What is not working and why? What could be done differently?
   - What internal or external challenges\(^2\) have been encountered during initiative implementation? Has this led to any changes?
   - What are up to three ways in which Laudes Foundation staff can better support you?
   - What lessons learned emerge for Laudes Foundation and you to consider?

Additional questions can be part of partner-Programme Manager verbal monitoring (check-in) discussions, as needed.

6. **Financial report**
   - Brief financial report for the calendar year which will include:
     - The original amount of the grant, plus decisions made on remaining balance.
     - Report on co-financing secured—source and amount.

7. **Annexes** (as appropriate)
   - Any case studies related to the initiative’s contribution to outcomes.
   - List or describe the most relevant, recent publications, press coverage or external communications relating to the initiative.

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\(^2\) This should include a discussion of any internal organisational challenges such as change of personnel or financial issues.
End-of-Initiative Learning Report

The end-of-initiative Learning Report will be submitted in accordance with the initiative grant proposal and grant agreement with Laudes Foundation. Learning Reports are required from all initiatives (irrespective of grant size and duration) and are to be submitted at initiative grant closure. Co-funded initiatives will submit reports aligned with other funders along with reporting against the rubrics (for grants above €100K). All initiative grants of less than €100K and / or less than one year of duration only have to submit an end-of-initiative Learning Report (not including rubric reporting and ratings).

For any partners that require follow-on funding, the end-of-initiative learning report must be submitted prior to submission of a new grant proposal. After partners submit a report, foundation staff conduct a review and provide feedback and questions, as appropriate. Learning reports should be brief and no more than 20 pages in length (excluding annexes).

Each end-of-initiative Learning Report shall provide the following information / responses to questions:

1. **Cover sheet:** Initiative title; organisation legal name, geographical reach of the initiative total grant value; co-financing\(^3\) expected and realised; grant award date and end date;

2. **Objectives and adaptations:** Briefly state the initiative objectives and explain what, if any, adaptations were made during implementation and why?

3. **Results:** What results did the initiative achieve?
   - Short summary of achievements: Briefly point out the key achievements
   - Provide final ratings for rubrics and brief narrative justifications, with disaggregated evidence by gender, sex and socio-economic background, where appropriate and feasible
   - Summarise success factors and / or those which challenged performance
   - Summarise and give reasons for any unexpected results

4. **Lessons Learned:** What are the most important lessons learned? What worked well and why? What did not work well and why? What could be done differently?
   - At the initiative level
   - At the organisational level
   - With other partners

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\(^3\) Co-financing is defined as financial or in-kind resources that are additional to the foundation grant and directly support the implementation of the initiative and achievement of results committed at approval. Types of co-finance are: grants, loans, equity investments, committed in-kind support.
5. **Recommendations:** What are the recommendations for: (a) the Partner and (b) to Laudes Foundation?

6. **Financial report:** A detailed financial report for the full duration of the grant, which will include:
   - The original amount of the grant and any decisions made on remaining balance.
   - Expenditures including explanation of under / overspend or reallocation of grant funds (using the same categories provided in the proposal).
   - Report on co-financing (source and amount), including explanations for any failures to secure co-financing

7. **Additional questions** can be part of the report as requested by the Programme Managers

8. **Annexes** (as appropriate)
   - Any case studies related to the initiative’s contribution to outcomes.
   - List of most relevant publications, media coverage or external communications relating to the initiative.
Please refer [here](#) for the complete list of available rubrics (A, B & C), their definitions and ratings.

### Annex A

**Initiative Quality Snapshot (Process Rubrics)**

<table>
<thead>
<tr>
<th>Rubric</th>
<th>Previous Rating (please insert the baseline or previous rating according to the rating scale for each rubric)</th>
<th>Current Rating (please insert the rating as per the rubric description)</th>
<th>Current rating justification (evidence &amp; reasoning), including why &amp; how ratings have changed (The suggestions are illustrative to serve as inspiration in completing this section and not limited to the following)</th>
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<tbody>
<tr>
<td>A1. Design</td>
<td></td>
<td>How appropriate is the design to the operating context(s)? Has the design of the initiative allowed for appropriate management of risks? How well does the design build on past lessons? Is resourcing as originally designed appropriate for the contextual phasing?</td>
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<td>A2. Implementation</td>
<td></td>
<td>How well is implementation enabling capacity and inclusion? How well have constraints (external or internal) to implementation been addressed?</td>
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<td>A3. Monitoring and Adaptive Management</td>
<td></td>
<td>How well are monitoring and evaluation processes supporting learning? How well is evidence and data used for decision making and adaptation?</td>
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<td>A4. Communication and Learning</td>
<td></td>
<td>How well has communication among implementing partners, actors, Laudes Foundation, and/or in the field facilitated openness and reflection for learning? How well has external communications when appropriate maximised impact, effectiveness and learning?</td>
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<tr>
<td>A5. Organisational and Network Capacity</td>
<td></td>
<td>Please reflect on elements such as strength and clarity of organisational vision and mission, strength of leadership and governance; staff skills and capacities to achieve the organisational/mission; financial stability; organisational culture etc.</td>
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### Annex B

**Outcome Situation Snapshot (Selected Early / Later Changes and 2025 Outcome rubrics)**

<table>
<thead>
<tr>
<th>Rubric</th>
<th>Previous Rating</th>
<th>Current Rating</th>
<th>Current rating justification (evidence &amp; reasoning), including why &amp; how ratings have changed</th>
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<tr>
<td>B#....</td>
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<td><strong>Specific changes</strong> How substantial and valuable</td>
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<td>How substantial and valuable</td>
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