

Partner Reporting Guidelines

The guidelines provide partners with the reporting requirements of Laudes Foundation.

Reporting is divided into two stages:

1. **Monitoring reporting is conducted by the partner** and is part of the monitoring function that provides an assessment of progress towards agreed outputs and outcomes, including tracking against key performance indicators as outlined in the initiative's logframe or theory of change (if applicable). Partners are also required to report challenges encountered during implementation and remedial actions to be undertaken.
2. **The end-of-project evaluation is to be conducted by the partner and is a self-evaluation** to be produced by partner staff.

The end-of-project evaluation has many benefits for partners, Laudes Foundation and future initiatives:

- Encourages transparent reporting of positive and negative results;
 - Highlights success factors as well as challenges;
 - Distills lessons and recommendations to guide improvement for the partner and future foundation initiatives through the identification of what works and what does not and why;
 - Gives partners influential information to report to current or potential funders.
3. **Independent end-of-project evaluation:** The foundation may for specific initiatives also request an independent evaluation of performance and achievement of results. Independent evaluations will be conducted by external evaluation experts or teams of experts. The need for independent evaluation will be specified in the initiative design and contract, and budgeted accordingly.

Monitoring Reporting is conducted in accordance with the time schedule outlined and agreed with Laudes Foundation in the proposal and grant contract.

Each monitoring report¹ shall provide information / responses to questions:

1. Cover sheet with: Initiative title; grant reference number; partner name; total grant value; co-financing expected and realized; grant award date and end date; number of beneficiaries reached vis-à-vis number of expected beneficiaries.
2. What progress was made towards outputs and outcomes (results)?²
 - a. Any failure to report against indicators must be explained and justified.
 - b. Please explain and justify if there are any changes in activities, outputs and outcomes as stated in proposal.
3. How is the initiative working to ensure sustainability and scalability?
4. What (if any) internal or external challenges³ have been encountered during initiative implementation?
 - a. What mitigating measures are being taken (or are planned) to address challenges?
5. To what extent has the initiative produced any unintended or unexpected initiative results? If so how are the affects being addressed?
6. How many beneficiaries have been reached by the initiative?
 - a. With gender disaggregated reporting of benefits and affects, where appropriate.
7. What are the recommendations for the next phase of implementation?
8. What are the emerging lessons learned?
9. How can Laudes Foundation staff better support you in achieving your goals?

Annexes

- List or describe any relevant and recent publications, press coverage or external communications relating to the initiative.
- Full financial report (to be required for annual reporting) which will include:
 - The original amount of the grant, plus remaining balance.
 - Detailed expenditures against activities and outputs proposed, including explanation of under / overspend or reallocation of grant funds (using the same categories provided in the proposal).

¹ The foundation will determine the exact periodicity of reporting depending on factors such as grant type, duration and partner capacities.

² Partners are required to report against indicators and targets stated in their log-frames or theories of change.

³ This should include a discussion of any internal organisational challenges such as change of personnel or financial issues.

- Report on co-financing secured from other sources.

End-of-Project Evaluation (self-evaluation) will be submitted in accordance with the initiative proposal and grant contract agreed with Laudes Foundation. End-of-project evaluation are mandatory for all initiatives funded by Laudes Foundation. The end-of-project evaluation is to be submitted before an initiative closes.

For any partners that require follow-on funding, the end-of-project evaluation must be submitted prior to submission of a new proposal. After partners submit a report, foundation staff conduct a review and provide feedback and questions, as appropriate.

Each end-of-project evaluation shall provide the following information / responses to questions:

1. Cover sheet: Initiative title; grant reference number; partner name; total grant value; co-financing; grant award date and end date; expected and actual number of beneficiaries reached.
2. A brief overview of the self-evaluation methodology, data sources (evidence) both qualitative and quantitative.
3. A description of the initiative and explain what, if any, changes in objectives and activities were made during implementation and why?
4. To what extent was the initiative effective in achieving results (outputs and outcomes)?
 - a. Provide the number of beneficiaries reached with gender-disaggregation and attention to vulnerable groups (e.g. migrants, women), where appropriate.
 - b. Explain success factors and those which impeded performance or led to initiative failure (both internal and external).
 - c. Provide beneficiary case studies or 'voices' that illustrate success and / or failure.⁴
5. Did the initiative produce any unexpected or unintended results? If yes, how were these aspects addressed during the initiative?
6. To what extent are the initiative results sustainable?
 - a. Please assess financial, social, political and environmental sustainability, as appropriate and necessary;
 - b. What are the probable long-term impact(s)?
7. To what extent are the results of the initiative scalable?

⁴ Beneficiary case studies may be submitted in a written format or in combination with video or pictorial evidence.

8. To what extent was the initiative efficiently implemented?⁵
9. What are the lessons learned? (limit to top 5)
10. What are the recommendations for: (a) Partner organization; (b) future initiatives; and (c) to Laudes Foundation

Annexes

- List of publications, media coverage or external communications relating to the initiative.
- A detailed financial report for the full duration of the grant, which will include:
 - The original amount of the grant and any remaining balance to be returned to Laudes Foundation.
 - Expenditures against activities and outputs proposed, including explanation of under / overspend or reallocation of grant funds (using the same categories provided in the proposal).
 - Report co-financing, including explanations for any failures to secure co-financing.

If the initiative was ONLY for the purpose of holding a research / convening (workshop / conference or meeting or series thereof), Laudes Foundation requires the partner to provide:

1. Cover page with the grant reference number and the term and amount of the grant; any co-financing secured; expected and actual number of beneficiaries (participants).
2. What was the research / convening agenda(s)? Where appropriate provide the title of the meeting(s) and where and when it was held.
3. How many stakeholders attended? What organizations or brands were represented?
 - a. Please compared to expected number of beneficiaries. Any differences are to be explained and justified.
4. What were the outputs (products) from the research / convening(s)? (E.g. background materials, Power Point presentations, proceedings, research papers, media articles).
5. What were the results (outcomes) of research / convening(s)? Result may include:
 - a. Reported changes in behavior of attending organizations;
 - b. Recommendations that have been taken up by another organization;
 - c. Formation of a working group on the issue the research / convening addressed;

⁵ Efficiency assessment should address (a) implementation management including changes in initiative during implementation; (b) timing including any implementation delays and time extensions; and (c) stakeholder management and participation.

- d. Policy influencing or industry advocacy; or
- e. Receiving funding for an initiative derived from the research / convening.

Annexes

- List of publications, media coverage or external communications relating to the initiative.
- A full financial report, which will include:
 - The original amount of the grant and any remaining balance to be returned to Laudes Foundation.
 - Expenditures against activities, including explanation of under / overspend or reallocation of grant funds (using the same categories provided in the proposal).
 - Report co-financing. Including explanations for any failures to secure co-funding.