

Measurement and Evaluation Learning Report Guidelines for Partners

March 2025



Why are Learning Reports valuable; what we expect to see and how we will use them?

Reporting is only useful if it informs learning, adaptation and ultimately improved results, and in doing so is used by the partner organisation [you] and the foundation together.

Reporting should help answer three key questions:

- 1 How well are we
- 2 What are we
- 3 How can we

We expect Learning Reports to provide an assessment of progress towards outcomes (early and later changes), as well as on the process. They should:

- Encourage reflection about impact and related explanatory factors;
- Highlight challenges encountered, including how these were overcome and those which remain to be addressed;
- Distil lessons learned and recommendations to guide improvement for the partner organisation and Laudes Foundation.

The content of the Learning Reports are used to improve the quality and impact of Laudes Foundation's programming.

On the reporting process

For initiatives above €100K:

- Learning Reports are requested **once a year**, including the evaluative rubrics.
- If the initiative is up to 18 months, **one annual learning report at the end of the initiative is sufficient.**
- If the initiative is over 18 months, **an annual learning report and end-of-initiative report** will be submitted.
- When Laudes is joining others to co-fund an existing initiative, the partner organisation can submit reports aligned with those funders. However, this reporting will **include rubrics.**

For initiatives under €100K:

- One Learning Report at the end of the initiative is sufficient. Rubrics are not required.

For any partners that request follow-on funding, the end-of-initiative Learning Report must be submitted prior to submission of a new grant proposal. After partners submit a Learning Report, foundation staff conduct a review and provide feedback and questions, as appropriate. Informal conversations around progress, challenges and learning between partners and programme managers are encouraged, as needed.

On content and format

Reports can be up to 10 pages in length (excluding annexes). They should be thought-starters between the partner and programme manager. The annual learning report should include the following:

1. Cover sheet	Initiative title; organisation legal name; geographical reach of the initiative; total grant value; co-financing ¹ expected and realised; grant award date and end date.
2. Initiative snapshot of process	Self-assessment of the initiative on process, implementation, etc – based on the A rubrics framework (see Annex A).
3. Initiative snapshot of outcomes (changes):	<p>For Initiatives below 100k (not reporting on rubrics): Please provide a summary of key achievements (focusing primarily on outcomes, not just outputs and activities).</p> <p>For initiatives above 100k (reporting on rubrics): Assessment of the current situation where you are intervening for each relevant rubric related selected (see Annex B) and the organisation's contribution to change. Each rating requires a short justification, including an explanation of any changes in the rating since the previous report and evidence of contributions.</p>
4. Unintended changes	Please provide a summary of any unintended changes not covered in section 3.
5. What are you learning?	What key lessons are emerging? ² Do you have there any recommendations for Laudes and other partners in the wider field? If this is an ongoing initiative, how can Laudes Foundation staff better support you going forward?
6. Financial report³	Brief financial report including: <ul style="list-style-type: none">• Initial (or adapted) budgetary plan, expenditure so far, explanations for under/over expenditure or reallocation of funds, plus decisions made on remaining balance.• Co-funding secured (source and amount), including for any failures to secure expected co-funding.
7. Annexes (as appropriate)	<ul style="list-style-type: none">• Additional or complementary information on the evidence supporting the rubrics ratings;• Any case studies related to the initiative's contribution to outcomes;• List or description of the most relevant, recent publications, press coverage or external communications relating to the initiative.

¹ Co-funding 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-funding are: grants, loans, equity investments, committed in-kind support.

² If helpful, please consider "What has worked well and why? What did not work and why? What could be done differently?"

³ A template can be provided if helpful.

Annex A: Initiative Snapshot of Process (using A rubrics)

Please find the A rubrics and guiding questions to help your reflection.

Rubric	Previous Rating (insert the baseline/initial or previous rating according to the rating scale for each rubric)	Current Rating (insert the current rating as per the rubric description)	Current rating justification (evidence & reasoning), including why & how ratings have changed (the following questions are prompts to guide your answers. Please choose the most relevant one, two, or three questions to answer)
A1. Design addresses the important issues and/or needs			<p><i>What are the objectives of the initiative, and what adaptations have been made so far?</i></p> <p><i>How well does the initiative's approach address climate and equity impacts, especially for the most vulnerable? Are there any gaps?</i></p> <p><i>How well resourced, budgeted, and staffed is the initiative, and does it have the right partners and support?</i></p> <p><i>How does the initiative build on past lessons, link to other efforts, and manage risks?</i></p>
A2. Implementation is inclusive, enabling, empowering and capacity-enhancing			<p><i>What adaptations were made during implementation and why?</i></p> <p><i>How professionally has the initiative been implemented, considering efficiency, ethics, cultural appropriateness, and inclusion?</i></p> <p><i>How effective are the strategies in engaging the community and empowering participating organizations, especially the most vulnerable?</i></p> <p><i>What changes have been made since the last report, and how do they justify the current rating?</i></p>
A3. Monitoring informs adaptive management			<p><i>Does the initiative have a monitoring plan, and how well is it being monitored and adapted by the partner organization and Laudes?</i></p> <p><i>Is evidence gathered effectively without straining resources, and are monitoring reports user-friendly and engaging?</i></p> <p><i>Are there regular meetings for collective learning and reflection, involving all key stakeholders?</i></p> <p><i>How is real-time adaptive management implemented, and what changes have been made since the last report to justify the current rating?</i></p>

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⁴ Particularly important for granting organisations or initiatives that rely on multiple implementing partners.

<p>A4. Communication promotes internal and external collective learning</p>			<p><i>How clear, open, and purposeful is communication within the initiative and with partners? Is there openness to reflect, learn, and be challenged?</i></p> <p><i>What worked well and what did not when communicating and collaborating with partners and stakeholders, and why?</i></p> <p><i>What could be done differently to improve communication and collaboration?</i></p> <p><i>How have external communications been used to maximize effectiveness, impact, and share learning? What changes have been made to justify the current rating?</i></p>
<p>A5. Organisational and network capacity⁵</p>			<p><i>Does your organization have the right knowledge, skills, and capacity? Are there any areas that need strengthening?</i></p> <p><i>How strong are your vision, mission, strategy, leadership, governance, and organizational culture?</i></p> <p><i>How stable is your financial situation and fund-raising capacity?</i></p> <p><i>How well does your organization assess and address capacity development needs, and what changes have been made since the last report to justify the current rating?</i></p>

⁵ This rubric is where organisations that receive Organisational Development (OD) support describe changes related to the areas being strengthened.

Annex B: Initiative Snapshot of Outcomes (or Changes)

Please refer [here](#) for the complete list of B and C rubrics, their definitions and ratings.

Which B and C rubrics does the report need to cover?

The initiative will have selected between one to four rubrics ([B rubrics](#)) and/or 2025 outcomes ([C rubrics](#)), which represent **the main impacts/changes the initiative is seeking to influence/contribute to that align with the changes Laudes is seeking to influence in the system.**

In the baseline (**in your grant proposal**), you have described what and where are changes the initiative has been seeking to influence. Your report should then document, based on the evidence available:

1. what **specific changes** have been seen since the previous rating (and the evidence for those),
2. **how substantial and valuable** the changes are relative to what is ultimately needed (please include the evidence and reasoning that led you to these conclusions), and
3. the evidence showing **how we know that the initiative contributed** to those changes (alongside the efforts of others, the context and situation, as well as other factors influencing the change).

How do we arrive at ratings?

Each outcome will have two ratings – a **baseline or previous rating** and a **current rating**. This shows what the situation was previously and how much change has been made to this point. **Bear in mind that influencing change in these systems is difficult to do, so the size of the shift may feel disappointing!**

When discussing **lessons learned** and **recommendations**, Laudes is particularly interested to understand what has been learned about the barriers/challenges that have *not yet* allowed the needed outcomes to be fully achieved. **What else might help unleash the kind of impactful change the system really needs?** Your reflections may help Laudes to identify additional initiatives that could run alongside your efforts, addressing an adjacent aspect of the system that would then help your efforts better succeed.

Rubric	Initiative Outcome(s)- as written in your proposal	Previous Rating ⁶	Current Rating	Current rating justification (evidence & reasoning), including why & how ratings have changed
Selected B or C rubric				Specific changes;
				How substantial and valuable are they;
				How the initiative contributed to them.

⁶ Please insert the baseline (initial) rating if this is the first annual Learning Report.