**Project/ Programme Technical Report Guidance and Template**

**PART 1: GENERAL NARRATIVE REPORT (due every 6 months, recommended length 6 pages)**

a. This summary report is designed to support team reviews, and is required to keep the WWF network informed of progress and learning. If you are reporting on behalf of a project/ programme that consists of a number of closely related (sub) projects, it is recommended to consolidate your reporting into one TPR (this should be agreed with relevant donors).

b. Text in bold expresses the essence of each section. Bullets underneath provide guidance.

c. Projects (only) may omit Questions 2 and 5 (asterisked\*) if network donors agree. However, their completion is encouraged as they provide a fuller picture of the work a project is undertaking.

**d. Remove the description of each section before finalising your report.**

|  |  |
| --- | --- |
| **Project/ Programme Name:** |  |
| **Project/Programme Number(s):** |  |
| **Web Link(s) to project/programme strategic plan or other useful documents:** |  |
| **Reporting Period:** |  |
| **Project/Programme Start Date (FY):** |  |
| **Report Completed by:** |  |
| **Date Report Completed (MM/YR):** |  |

**1)** **Key Outcomes and Impacts Achieved (approx. 1-2 pages)**

* Succinctly share key results in relation to the goals (impacts) and objectives (outcomes)[[1]](#footnote-1) defined in your strategic plan; where possible, structure or reference the results in relation to the latest draft Global Practice goals and outcomes[[2]](#footnote-2)
* Include important unexpected outcomes, and any exceptional achievements such as up scaling or replication
* Use graphics, tables and attach appendices if necessary, and/or refer to Part 2, and include links to related communications materials[[3]](#footnote-3)
* Briefly and specifically state what role the project/WWF/ partners played in bringing about the results e.g. refer to the theory of change
* Describe any effects, both positive and negative, on beneficiaries (including indigenous peoples involvement where applicable)[[4]](#footnote-4)

**2)** **Sharing of Lessons Learned\* (approx. 1 page)**

* Describe a small number (1-3) of key lessons that have been learned and that you have shared (or want to share) with others. Where possible, relate these to assumptions in your theory of change
* Be precise and tell a story, providing enough information to be helpful to others. We would like to see key learnings from both success or failure, and existing gaps where innovations and collaborations are necessary[[5]](#footnote-5)

**3) Effective Implementation of Workplans and Budgets\* (max. 1 page)**.

* Briefly summarise whether progress against major activities is going according to schedule? If not, why not?
* Highlight any problem areas, the underlying issues, and any remedial actions
* Relate this to any major variances in your financial report

**4)** **Challenges and Strengths Affecting Performance (max 1 page)**

* Consider both internal (e.g. management processes, capacity, donor support) and external aspects (e.g. stakeholder behaviour or engagement, partner collaboration or leverage)
* Mention any particularly significant challenges (including funding) or opportunities coming up

**5)** **Adaptive Management (approx. 1 page)**

* Describe any major changes made or needed in terms of objectives, strategies and financial investment
* Base this section on a thoughtful analytical process
* Perhaps consider the alignment and relationship to Global Practices

**PART 2: Monitoring REPORT (year end only. Required only at year end from projects/ programmes/ Priority Programmes with budget > €100K per year. Submit as excel or word table or directly in Insight).**

The monitoring report requires the project team (and key partners/stakeholders where possible) to systematically review and discuss data/information, and identify against planned goals and objectives, using associated indicators. This analysis should help the team assess the progress of the strategy, and enables adaptive action. Data collected during the year is part of ongoing project management; this data is the key ingredient for the monitoring report.

## **WHAT SHOULD YOU DO**

1. **Prepare a monitoring report table using goals, objectives and indicators from the strategic plan (see Table 2).** The Monitoring Report table should contain all programme goals and objectives from your latest strategic plan (not your annual work plan). Keep the goals and objectives separate from each other. Include information in all the columns of the Monitoring Report to the extent possible. You may submit the Monitoring Report table as a separate document in Excel if you prefer (an Excel version of the table is available); you may also create the monitoring report directly in Insight/CPM. You may include additional columns if appropriate (e.g. to show longer-term data trends or data collected for common indicators).

2. **Highlight some of the top priority long-term results (**objectives) that you are working towards. The Conservation Achievement rating is calculated based on progress towards **a few key long-term objectives.** A long-term objective is one that directly contributes to the improved status of the conservation target(s) or to your goals. Usually it will relate to a direct threat, indirect threat, or driver. If you have a results chain, long-term objectives tend to be found on the right-hand side. Examples of long-term objectives include: (1) “By 2020, the number of elephants killed in the landscape in retaliation for crop-raiding and human loss of life has been reduced to 2 cases per year”; or (2) “Governments, industry, and other stakeholders in selected priority regions adopt ecosystem stewardship as the basis for spatial planning and any new development in the Arctic by 2021.”

3. **Common indicator.** If your indicator is linked to one of the common indicators https://sites.google.com/a/wwf.panda.org/wwf-international/divisions/conservation/cspu/results-based-management-group/review-of-wwf-reporting/group1/impact-papers-for-review/indicators

you should add the number of the indicator to this box (e.g. 1 for habitat loss, 2 for river fragmentation, etc.). If you have data already recorded for this indicator, please include and add one or more additional column(s) to provide the data if necessary. If you only select an indicator from the menu we will know to contact you to discuss your data, and hopefully capture it in global level portfolio analyses. **Note that use of common indicators can help you identify the linkages to the Practice outcomes.**

4. **Formulate a conservation achievement rating for each of the prioritised long-term results/objectives.** The rating should be made in relation to your annual planned intermediate results (PIRs) for the current year. To rate each objective/result, compare your current status against the planned result for the year and use the scoring guidelines below to assign the most appropriate rating.Make sure that the planned PIRs indicate clear progress towards achievement of the objective (and reference indicators where possible), and hence that the theory of change is working.It is important for the project/ programme team to use its judgment and to be as objective as possible. Ratings range from 1 to 7, and fractional ratings are also possible, for example, a rating of 4.50. The ratings will be turned into percentages for use in the Global Conservation Programme report.

5. **It is very important to give a justification for your ratings.** This serves to clarify the evidence for your rating and for your result.

6. **Calculate an overall conservation achievement rating for the project/programme** based on a simple average (arithmetic mean) of the individual scores for the objectives that you have included

## **ADDITIONAL GUIDANCE**

7. **Focus on providing quality information on progress** against goals and long-term objectives. Reporting on any short-term objectives should be kept simple and light. (Short-term objectives do not directly lead to an improvement in conservation target status, but constitute steps toward achieving the long-term objectives; examples may include “Establishment of a roundtable for sustainable whitefish management by 2017”; or “X fishing associations agree to adopt the use of circle hooks by 2016”. There may be several short-term objectives leading to a long-term objective). These can also be part of the planned intermediate results in the case of footprint programmes for instance. Indicators at goal level, and for some objectives, may not be measured annually, so not all objectives will have a planned result for every year. For example, for biological indicators, and some socio-economic indicators, measurement will likely be at longer intervals. Where no new information is available, state Not Rated (NR) and when the next measurement/assessment is due.

8. **Please provide more detailed information as needed** (but be strategic in your choice) and attach as additional documents (e.g. additional monitoring data, graphs, diagrams, reviews or evaluations).

9. **Social/ poverty/ gender data / indigenous peoples**. Where possible and appropriate, data should be disaggregated by gender. Disaggregation by age and other social groupings should also be considered.

**Scoring Guidelines for Conservation Achievement KPI ratings**

|  |  |
| --- | --- |
| **Descriptor** | **Rating** |
| The planned intermediate result for the current FY has been entirely met (or almost) and demonstrates clear progress towards the objective, or the objective has been achieved entirely.  There were moderate shortcomings in the achievement of the planned intermediate result for the current FY.  The achievement of the planned intermediate result for the current FY is very low | **7** |
| **6** |
| **5** |
| **4** |
| **3** |
| **2** |
| **1** |
| There was no planned intermediate result for the current FY, therefore it was Not Rated. | **NR** |

**Table 2. Monitoring Report (including Conservation Achievement KPI)** *(see guidelines above for completing the table****)***

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Goals**  Good goals are SMART and linked to biodiversity, human welfare, or footprint reduction.  Columns in black indicate information to draw directly from your monitoring plan | **Indicator**  (what you are measuring & the metric) | **Common Indicator**  **(add the number of the common indicator you contribute to)**  Please use common indicators as much as possible and especially where they help demonstrate a contribution to a new global goal or outcome. | **Baseline (value & date)** | **Planned Intermediate Result (PIR)**  *(“What result the project planned to achieve by this time”)* | | | | | **Current status this year**  *(“what result was achieved by the time of this report”)*  Columns in red indicate information specific to the TPR | **Planned Final Result (value & date)** |  |  |
| **FY** | | **FY** | | **FY** |
|  |  |  |  |  | |  | |  | Where no new data available, state when next measurement due. |  |  |  |
| **Key Long-term Objectives** | **Indicator**  (what you are measuring & the metric) | **Common Indicator**  **(add the number of the common indicator you contribute to)** | **Baseline (value & date)** | **Planned Intermediate Result**  *(“what result the project planned to achieve by this time”)* | | | | | **Current status this year**  *(“what result was achieved by the time of this report”)* | **Planned Final Result (value & date)**    Did the current status meet the planned result? | **Conservation Achievement Rating** | **Justification(s) for rating** |
| **End-FY15** | **End-FY16** | | **End-FY17** | |
| These should be based on what is in your strategic plan |  | Add additional red columns for any data you have on common indicators if different than actual indicator |  |  |  | | What are the milestones you intend to reach to achieve the objective? PIRs are needed to help track progress against long-term objectives. | |  |  |  |  |
|  |  |  |  |  |  | |  | |  |  | How did you choose the rating that you gave? |  |
| **Overall Conservation Achievement Rating (based on long-term objectives** | | | | | | | | | | |  |  |

1. Please find more detailed information, such as FAQ document on <https://sites.google.com/a/wwf.panda.org/wwf-international/divisions/conservation/cspu/fy-17-reporting> [↑](#footnote-ref-1)
2. Latest info from Practice Goals/Outcomes <https://sites.google.com/a/wwf.panda.org/global-practice-info-hub/> [↑](#footnote-ref-2)
3. Particularly helpful to have short stories, call-out quotes, videos, maps, data for infographics, and images, etc. [↑](#footnote-ref-3)
4. Where possible quantify the number of beneficiaries (direct and indirect) with data disaggregated by gender. [↑](#footnote-ref-4)
5. Similar to the first section, associated short stories, call-out quotes, videos, maps, data for infographics, and images, etc. can be very helpful. [↑](#footnote-ref-5)