

ANALYZING AND REPORTING QUARTERLY OUTCOMES

Review and Analysis of Progress

Prior to completing your quarterly progress report, and in preparation of the Results and Learning Session, think about the following things related to each of the areas of your project (below in bold) and focus in on milestones where you have a +/- 10% variance from your projected numbers:

1. What were the original assumptions and thoughts when the proposal was written?
2. What is currently happening? What is seen in reality?
3. Are there discrepancies between what was anticipated and what has turned out to be the case?

Below are some additional probing questions/areas to look at for each of the project areas to stimulate your analysis of progress and project outcomes.

Use this as a guide to focus in on the critical aspects, which you will include in the report as you continue through the other two sections of this guide.

Participants/Stakeholders

- Are they the same or different from those identified in the proposal?
- Are there more or fewer identified? Why?

Key Activities/services quality

- What are the key activities you identified in the proposal?
- Are they being used as identified in the proposal?
- Are there new/different activities identified? How are they being used?

Key Activities/services intensity

- What activities are being used and how much are they being used?
- If more of the activities are being used than anticipated in the proposal, is it getting the desired results? What are the implications on the project and lessons learned?
- If fewer activities are being used than anticipated in the proposal, are they getting the desired result? What are the implications on the project and lessons learned?

People/Groups

- Are the talents of the people/partners identified in the proposal evident and being used?
- Are there different people/partners with different talents being used? What is the impact on the project?
- Do you need new or different people/partners to achieve the results to which you committed.

Milestones

- When looking at the numbers in your milestones as participants/stakeholders move from one milestone to the next, how do your projected numbers compare with the actual milestones achieved?
- Are there trouble spots seen?
- Are some milestones too easy for participants/stakeholders to achieve meaning they're non-critical?
- What are the factors that affect whether or not the milestones are achieved?
- What were the assumptions made for the drop off of numbers/participants/stakeholders in the milestones from one to the next?

Milestone Chart Analysis

Now critically analyze what the milestone numbers are telling you.

If a milestone step WAS MET:

What led you to achieve? Did you set your sights too low? How can you capitalize on whatever factors allowed you to succeed and incorporate this into your program design to make your project even more successful?

If a milestone was NOT MET:

What are possible changes to make that should result in reaching the projected milestones the next quarter or significantly catching up? Try to sequence changes if making more than one change, so the impact of the change can be isolated and evaluated.

Go to "Your Learnings" in the Report

For milestones in which you had over +/- 10% variance from your projected numbers, describe the implications and changes for your project that you arrived upon after the above analysis.

Write your answer to these questions for the area/factors that you decide are most important and you will act upon.

1. What course correction (things you'll do differently) are you recommending and making to the participants/stakeholders, program activities, people and/or milestones you described in your original proposal?
2. Why do you feel this is the correct course correction to make (to reach milestones if they were not being met, or to improve upon the project if you were significantly over)?
3. If you made a good choice in a course correction, what do you expect to see happen in the next quarter to your milestone numbers (so you can make a different course correction should you see this is not happening as you'd anticipated)?

Articulate Learnings from the Quarter

Think through what you learned as you implemented the project over the past quarter both for things that didn't work as well as projected and things that were much better than projected.

- What worked well and is critical to success? What was unnecessary or shown detrimental to the project?
- Are there proven techniques or general rules that describe correlations between variables or factors (things that always happen together or if one thing happens the other won't)?
- Based on techniques you found to work and factors that you found helpful or not helpful, what do you recommend to a project similar to yours or a replication of your project?
- Based on techniques you found to work and factors that you found helpful or not helpful, what do you recommend to a project different in intent from yours, but sharing common techniques/ methods/ or other factors?

Go to "Your Learnings" on Report

Write what specific things you learned and describe how this was taken into account and reflected in your chosen course correction.

If there are larger implications that you feel would impact another project similar to yours, describe the learning in sufficient detail that we can generalize and apply the knowledge you gained.

Deadlines: Interim reports - April 15, July 15, October 14, 2016; Final report - January 15, 2017.

If you have questions, please contact Tristi Charpentier, Initiative Manager, Tristi@hwilson.org or 225-292-1344.